



eSTART

Managing Timecards and Schedules

Course Guide for Managers

July 2014

General Information About This Manual

This manual is designed to provide State employees with an overview of the eSTART Time and Attendance System. This manual provides basic procedures; however, you may need to seek clarification on specific agency procedures or rules from your agency personnel manager or supervisor.

Nothing in this handbook should be construed to amend any laws, regulations, policies or procedures established by the State of Alabama or specifically the Alabama State Personnel Department.

Certain procedures contained within this manual are subject to change or revision without prior notice. Employees will be notified as soon as possible when changes or revisions occur.

All leave accruals and usages in eSTART are estimates and/or projections that are based on the concept that all employees earn leave and have leave to use. These estimates and projections may not be accurate.

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Getting Started

Importance and Benefits of eSTART

Purpose

It is important that your employees are compensated accurately. To make this happen, you need to manage employees' worked and non-worked hours, as well as attendance issues, in an efficient and timely manner. The application supports your ability to perform these tasks so that the data sent to payroll is accurate.

eSTART provides the following benefits to the State of Alabama:

- Provide system-wide accountability in time and labor management.
- Provide up-to-date accrual balances and projections.
- Assists with standardization and accuracy of payroll process.
- Provide employees access to their leave balances.
- Eliminate manual processes ensuring cost and paper reduction.



Roles and Responsibilities

Purpose

Each employee and manager has responsibilities that are important in the payroll process. Each person's role determines the responsibilities and tasks that he or she performs in the application.

Common Employee Tasks

On a daily basis or as-needed basis, employees perform the following tasks:

- Enter time data using a clock device or PC.
- Request time off.
- Review and approve timecard each pay period.
- Review schedules, punches, and leave accruals.
- View Inbox.
- Request extended leave cases.

Common Manager Tasks

On a daily basis, managers perform the following tasks:

- Check for timecard exceptions and make edits when applicable.
- Handle unexpected absences and missed time.
- Enter non-worked time for employees.
- Make schedule changes.

On a pay period or as-needed basis, managers perform the following tasks:

- Schedule employees for a specific time period.
- Monitor timecards and reports to facilitate payroll processing.
- Review and approve timecards.
- Request backup coverage.
- Manage time off requests.
- Initiate extended leave case for employee.
- Create personal HyperFind queries.

Common Agency Administrator Tasks

On a pay period or as-needed basis, typical Agency Administrator tasks include:

- Sign off timecards.
- Perform final audit of time records.
- Add specific pay codes to employee timecards.



Common Leave Administrator Tasks

On a pay period or as-needed basis, typical Leave Administrator tasks include:

- Determine eligibility and open leave cases.
- Administer leave cases.
- Run leave reports.

Common State Administrator Tasks

On a pay period or as-needed basis, typical State Administrator tasks include:

- Run reports.
- View/Update People records.



Logging On

Purpose

The eSTART log on page provides access to all the features of the eSTART application where you perform your time and attendance tasks.

User Name and Password

If you use a computer and log on to the State's network, your User Name and Password will be the same as used to log into that network for the eSTART system. This is usually your full email address: **john.doe@finance.alabama.gov**.

If you do not have a network ID, your User Name will be provided by your Agency Administrator. The User Name will ordinarily be **firstname.lastname**. An initial password will also be provided that must be changed at first sign on.

Exercise

You, as a manager, log on to the eSTART application to review and work with your employees' timecards and scheduling data. It is a best practice to review this application each work day.

Steps

1	Access the eSTART log on page.
2	Enter your user name and password in the designated fields.
3	Click the Log On button or press the Enter key on the keyboard.



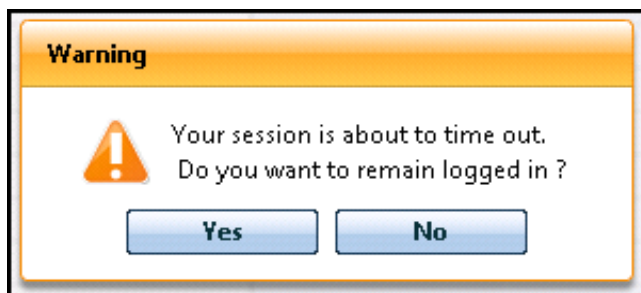
The Inactivity Timeout and Signing Out

Purpose

eSTART provides security to prevent other people from accessing your information. It also helps keep your employees' information confidential.

Regaining access after the inactivity timeout

The inactivity timeout protects sensitive information in the application. If the application does not detect activity within a specific amount of time, it attempts to automatically log you off. To regain access to the application, you must click Yes when asked to remain logged in. When you regain access, the application restores the last page you were viewing.



Best Business Practice

The inactivity timeout message displays if there is no activity for 30 minutes.



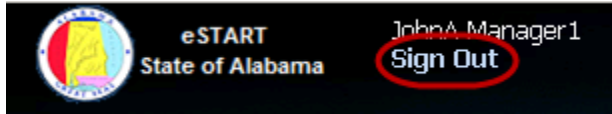
Caution

If you do not click Yes after receiving the inactivity timeout, you are logged out of the application. You will lose all unsaved edits.



Signing Out of eSTART

Upon completion of your tasks, you must sign out of eSTART to ensure that your employees' information remains confidential.



Caution

Clicking the Close (X) button without first signing out can leave your connection to the application open, which might allow unauthorized people to view and edit your information.



Tip

eSTART is a browser-based application. However, you should not use the browser's navigation controls—the Back button on the toolbar, for example. Only use the links inside of eSTART to do your work.





Navigating eSTART

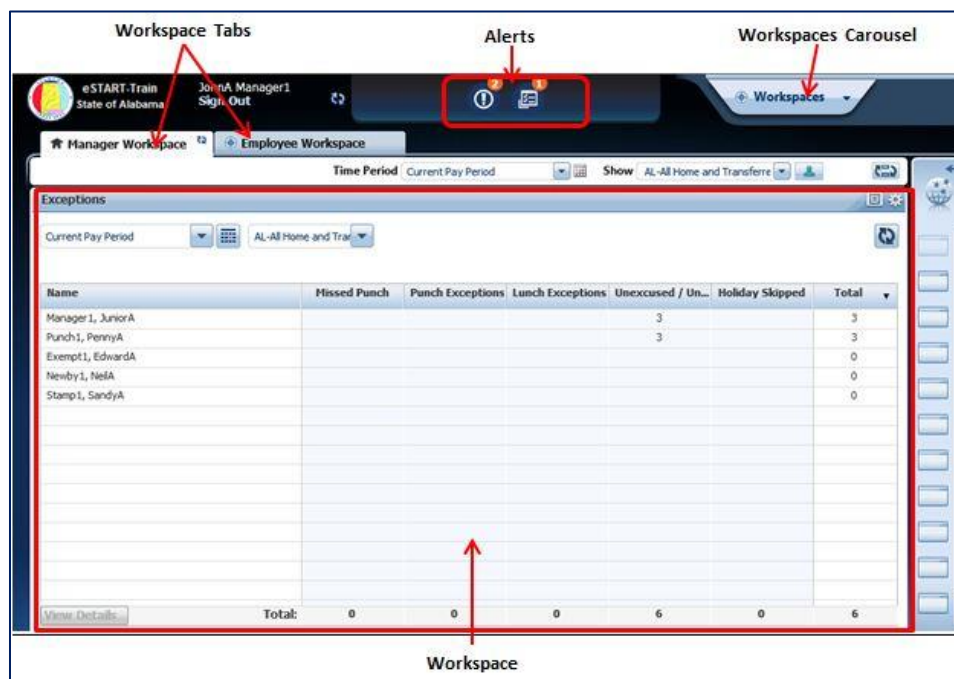
Introducing the Navigator

Purpose

After you log on to eSTART, your Navigator pane displays. The Navigator is a customized view of the time and labor information that is important to completing your daily work tasks. It is designed to be simple with easy-to-use views. You should take a few minutes to get acquainted with its navigation features.

Navigator Components

The Navigator consists of four main components; Alerts, Workspace, Workspaces carousel, and Workspace tabs.



Navigator Component	Description
Alerts	Your Navigator contains two alerts, Exceptions and Requests, which have been configured to notify you when specific events or conditions occur. Because the alerts always display in your Navigator, you will know immediately if something requires your attention.
Workspace	Your Navigator contains two other workspaces. A workspace is a layout designed to accommodate a specific business need. The manager workspace is the default or “home” workspace.
Workspaces carousel	Since the manager’s Navigator is configured to include more than one workspace, all workspaces other than the home workspace are listed in the Workspaces carousel. You can display additional workspaces in your Navigator by selecting them in the Workspaces carousel.
Workspace tabs	When a workspace is displayed in the Navigator, it will have an associated tab. You can use the workspace tabs to switch between or to close displayed workspaces. The manager workspace cannot be closed.




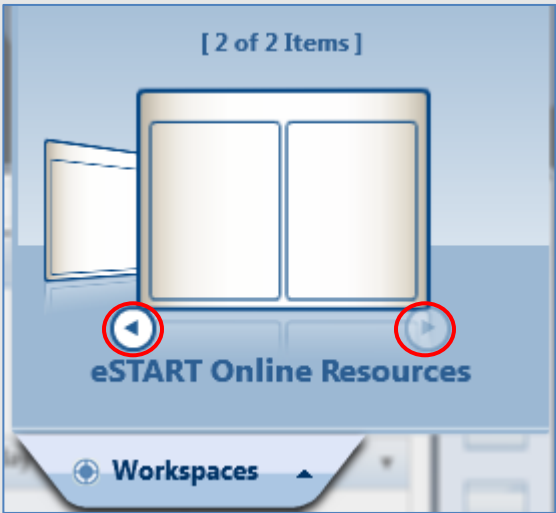
Viewing Workspaces

Purpose

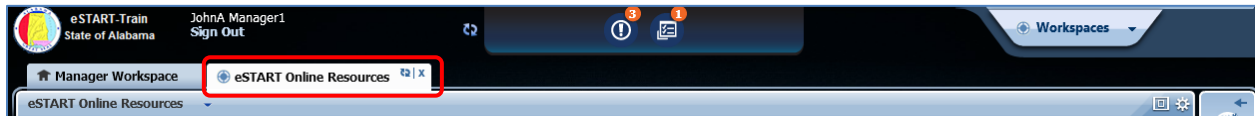
Your Navigator is configured to provide more than one workspace. The default workspace for Managers is the Manager workspace, but you can select other workspaces to display. Additional workspaces include:

- **Employee Workspace** – displays your individual timecard, calendar and request for leave functions.
- **eSTART Online Resources** - displays eSTART resources including job aids, training videos, etc.

Example

Steps		
1	To open the Workspaces carousel, click the Workspaces tab.	
2	Click the arrows to rotate through the available workspaces.	
3	To select a workspace, click it. Note: To close the Workspaces carousel without selecting a workspace, click the Workspaces tab again.	

The selected workspace opens and a tab for the workspace is added. The Workspaces carousel closes.





Switching between workspaces

After selecting workspaces from the workspace carousel, you can switch to a different workspace by selecting the associated tab. Note that your home workspace will be indicated by a 🏠 in the tab. The refresh button is used to refresh the page.



Closing a workspace

To close a workspace and return it to the carousel, click the **X**. The refresh button can be used to refresh the page.





Using the Navigator

Each workspace in your Navigator contains task-oriented widgets or views in eSTART, which enable managers to complete their most frequent tasks.

The following illustration shows the manager workspace configuration, including the Exceptions and Reconcile Timecard widget.

The screenshot displays the eSTART Manager Workspace interface. At the top, there is a header bar with the eSTART-Train logo, user information (JohnA Manager1, Sign Out), and a Workspaces dropdown menu. Below the header, the workspace is divided into three main sections: Synchronized Search Criteria, Related Items, and Widgets. The Synchronized Search Criteria section includes a Time Period dropdown set to 'Current Pay Period' and a Show button. The Related Items section shows a list of items with a 'Show' button. The Widgets section contains two main widgets: 'Exceptions' and 'Reconcile Timecard'. The 'Exceptions' widget displays a table with columns for Name, Miss, Pun, Lun, Une, Holi, and Total. The 'Reconcile Timecard' widget displays a 'RECONCILE TIMECARD VIEW' with a table showing actions for various users. Red arrows point from the labels 'Synchronized Search Criteria', 'Related Items', and 'Widgets' to their respective sections in the interface.

Name	Miss	Pun	Lun	Une	Holi	Total
Manager1, JuniorA				3		3
Punch1, PennyA				3		3
Exempt1, EdwardA						0
Newby1, NelA						0
Stamp1, SandyA						0
Total:	0	0	0	6	0	6

Name	Unexcused Absence	Missed Punch	Early In	Late In
Exempt1, EdwardA				
Manager1, JuniorA	✓			
Newby1, NelA				
Punch1, PennyA	✓			
Stamp1, SandyA				

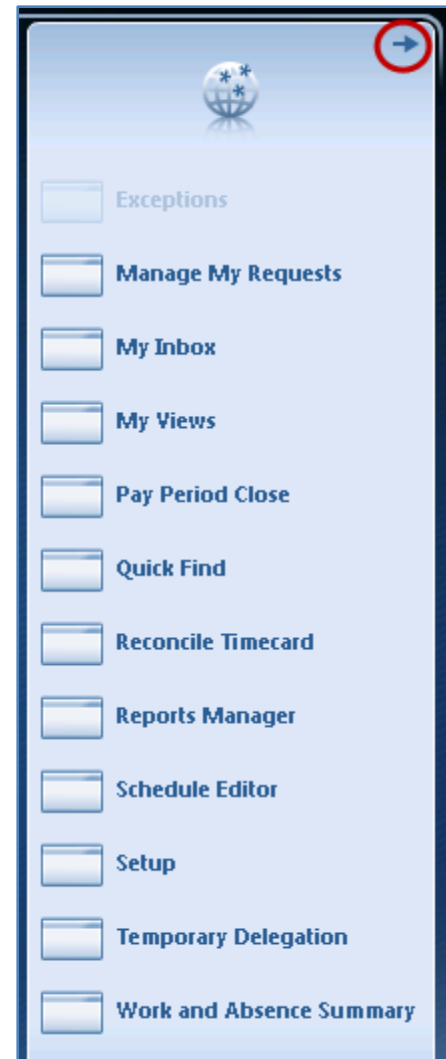
Workspace Components	Description
Synchronized Search Criteria	These elements can be synchronized with certain widgets so that these selections are used instead of choosing them separately within the different widgets.
Widgets	Widgets are self-contained components that are used to access specific eSTART information or tasks.
Related Items	Widgets that are available, but not displayed in the selected workspace, are accessed via the Related Items pane. They can be clicked/dragged into an open workspace, or clicked to open the widget in a temporary workspace.



The Related Items pane

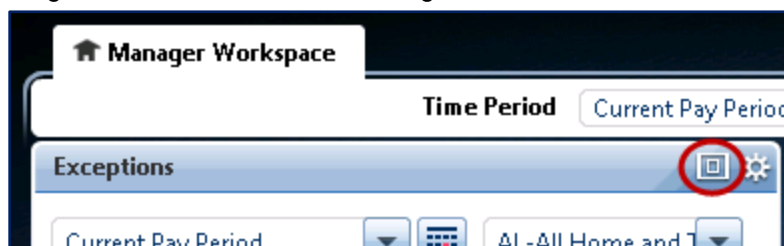
Widgets that are available but not displayed in the selected workspace are accessed via the Related Items pane. They can be clicked or dragged into an open workspace, or clicked to open the widget in a temporary workspace.

- Click the arrow in the upper-right corner to open and close the Related Items pane.
- Use the scroll buttons at the top or bottom of the pane to view additional widgets within the pane.



Managing Open Widgets

There may be occasions when you will see more than one widget open in the workspace, for example when you drag a widget to the workspace. To maximize a specific widget to fill the workspace, click the **Resize** button in the upper right-hand corner of the widget. You can click the same button in a maximized widget to return it to the default widget size.





Navigating Widgets in eSTART

Purpose

eSTART pages allow you to perform less common or more complex tasks. You can use widgets in eSTART to display these pages and complete these tasks.

The key areas of eSTART Pages

eSTART pages contain four main areas: Quick Links, search tools, the action bar, and the work area.

The screenshot shows the 'RECONCILE TIMECARD VIEW' page. At the top, there are navigation links: 'Timecard', 'Schedule', 'People', 'Reports', and 'Leave Cases'. Below these is a search bar with a 'Show' dropdown set to 'AL-A3 Home and Transf...', a 'Time Period' dropdown set to 'Previous Pay Period', and a 'Refresh' button. Below the search bar is an 'Actions' bar with dropdown menus for 'Punch', 'Amount', 'Schedule', and 'Leave'. The main table displays employee data with columns: Name, Unexcused Absence, Missed Punch, Early In, Late In, Early Out, Late Out, Unsched Hours, Holiday Skipped, and Totals Up To Date. Red arrows point to the 'Quick Links' (navigation links), 'Search Tools' (search bar), 'Action Bar' (actions dropdowns), and 'Work Area' (the table).

Name	Unexcused Absence	Missed Punch	Early In	Late In	Early Out	Late Out	Unsched Hours	Holiday Skipped	Totals Up To Date
Exempt1, EdwardA									✓
Manager1, JuniorA	✓	✓	✓		✓				✓
Newby1, Rella									✓
Punch1, PennyA		✓		✓		✓			✓
Stamp1, SandyA							✓		✓

Areas	Description
Quick Links	Allows you to quickly access the Timecard, Schedule, People record, Reports or Leave Cases related to any employees you select from the Name column.
Search tools	Include: <ul style="list-style-type: none">• Show field where you can select a specific set of employees• Time Period field where you select the timeframe for which you want to view schedules and timecard data
Action bar	Allows you to perform tasks to selected employees, such as editing punches, approving timecards, and other common tasks.
Work area	The work area contains detailed information about the employees in the selected time period, as well as the action bar, which contains selections for modifying data.



Exercise

Select certain employees and access the right-click menu.

Steps																				
1	In the work area, highlight Junior Manager and Penny Punch .																			
2	<p>Which system component do you want to access?</p> <ul style="list-style-type: none">To access timecards for the selected employees, click the Timecard quick link or right-click, then select Timecard.To access the Schedule Editor for the selected employees, click the Schedule quick link or right-click, then select Schedule.To access the People Editor for the selected employees, click the People quick link or right-click, then select People.To access the Reports for the selected employees, click the Reports quick link or right-click, then select Reports.To access the Leave Cases for the selected employee(s), click the Leave Cases quick link.	<table border="1"><thead><tr><th>Name</th><th>Unexcused Absence</th><th>Missed Punch</th></tr></thead><tbody><tr><td>Exempt1, NeilA</td><td></td><td></td></tr><tr><td>Manager1, NeilA</td><td>✓</td><td>✓</td></tr><tr><td>Newby1, NeilA</td><td></td><td></td></tr><tr><td>Punch1, PennyA</td><td></td><td>✓</td></tr><tr><td>Stamp1, SandyA</td><td></td><td></td></tr></tbody></table>	Name	Unexcused Absence	Missed Punch	Exempt1, NeilA			Manager1, NeilA	✓	✓	Newby1, NeilA			Punch1, PennyA		✓	Stamp1, SandyA		
Name	Unexcused Absence	Missed Punch																		
Exempt1, NeilA																				
Manager1, NeilA	✓	✓																		
Newby1, NeilA																				
Punch1, PennyA		✓																		
Stamp1, SandyA																				
3	Click the Resize button in the upper right-hand corner of the widget to return it to the default widget size.																			



Tip

There are various ways to select employees:

- Use the **Ctrl** key to select more than one employee not listed next to each other.
- Use the **Shift** key to select all employees listed between two employees, including the two employees.
- Click and drag the mouse to select employees.



Synchronized Search Criteria

The **Time Period** field allows you to set the timeframe you want to view, such as the current pay period or a particular timeframe in the past.

The **Show** field allows you to display a group of employees. The default setting for the Show field when you log on is **AL-All Home and Transferred-In**, which displays all employees that report to you. You can use the **Show** field to further refine your selection to include employees in a specific group, such as only those employees who are working in a particular area or on a particular shift.

The screenshot shows the Manager Workspace interface. The 'Time Period' dropdown menu is open, showing options: Previous Pay Period, Current Pay Period, Next Pay Period, Previous Schedule Period, Current Schedule Period, Next Schedule Period, Week to Date, Last Week, Yesterday, Today, Yesterday,Today,Tomorrow, Yesterday plus 6 days, and Last 30 days. The 'Show' dropdown menu is also open, showing options: AL-All Home and Transferred-In, All Home Locations, AL-All Home and Transferred-In, Arrears Employees, Current Employees, and Select Locations. The 'Arrears Employees' option is highlighted in the 'Show' menu.

You may set the widgets in the workspaces to use the same time period and employee list (Show field). After you select **Previous Pay Period** from the **Time Period** field and the **Arrears Employees** from the **Show** field, click **Synchronize**.

The screenshot shows the Manager Workspace interface with the 'Time Period' dropdown set to 'Previous Pay Period' and the 'Show' dropdown set to 'Arrears Employees'. A red box highlights the 'Synchronize' button in the top right corner. The 'Reconcile Timecard' section is also visible, showing a table with columns: Name, Missed, Punch, Lunch, Unexc, Holid, and Total. The table contains data for Stamp1, SandyA and Punch1, PennyA.

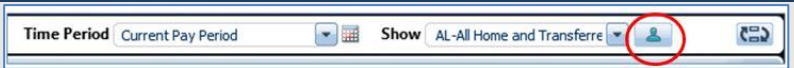
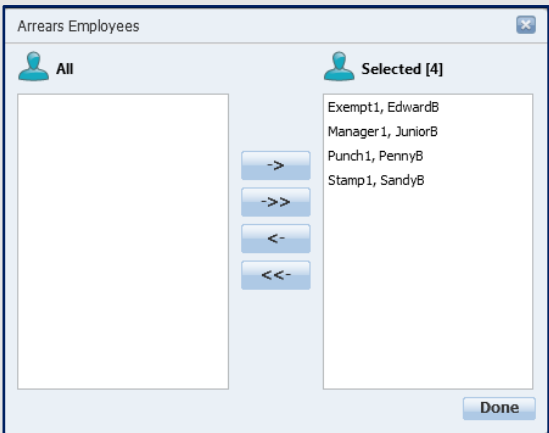
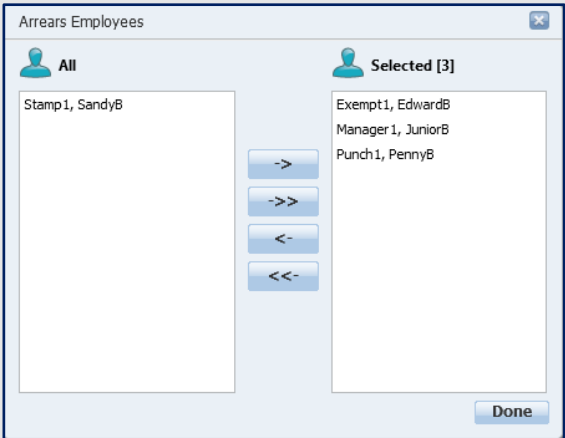

Notice all three **Show** drop-downs are now set to **Arrears Employees** and **Time Period** is set to **Previous Pay Period**.



Also located on the **Synchronized Search Criteria** bar is the “person” icon. It is located to the right of the **Show** drop-down and can be used to temporarily filter the selected HyperFind query.

Exercise

You want to view only the employees who report directly to you. Since Sandy Stamp reports to Junior Manager, you want to temporarily remove Sandy from the employee listing.

Steps		
1	Select the “person” icon.	
2	A list displays with the employee names included in the selected HyperFind.	
3	To temporarily remove Sandy Stamp from the HyperFind query, select her name from the right side of the pane and move it to the left side using the single left arrow.	
4	Click Done .	
5	The “person” icon will now display the number of employees remaining in the HyperFind.	



Steps

- 6 Click **Synchronize** again to update the employee listing in both widgets.



- 7 The employee listing will be modified to exclude the person(s) who were removed above.

Manager Workspace

Exceptions

Current Pay Period [dropdown] [calendar icon] 4 Employee(s) Select [dropdown]

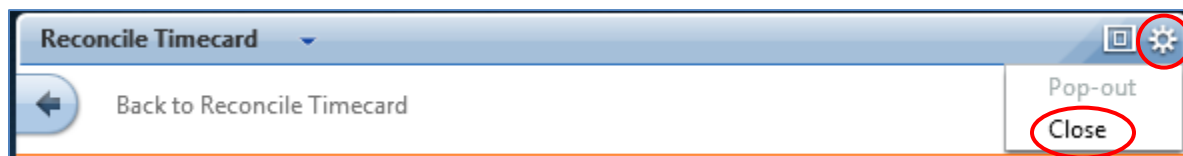
Name
Manager 1, Junior A
Punch 1, Penny A
Exempt 1, Edward A
Newby 1, Neil A



Note

This change is temporary. To return to the original listing, select the original HyperFind from the Show drop-down or open the “person” icon again and return the removed employee names to the “Selected” pane.

To close an open widget, click the widget’s gear icon and select Close to return the widget to the Related Items pane.





Managing Exceptions for Non-Exempt Employees

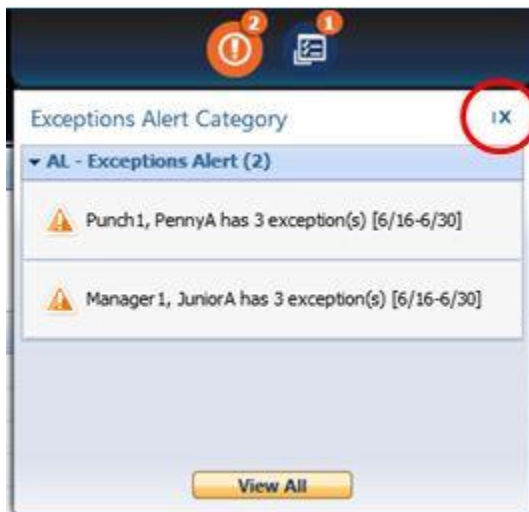
Using the Exceptions Alert

Purpose

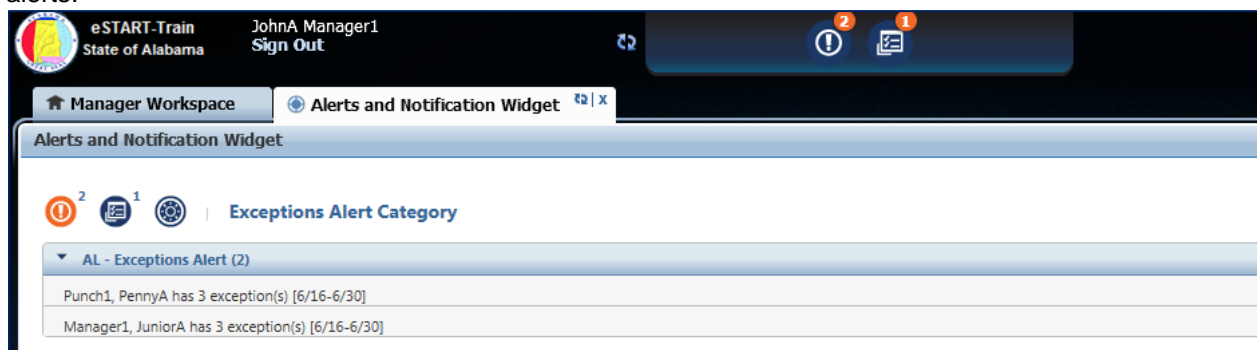
Your Navigator is configured to receive exceptions alerts. If one of your employees has triggered a time exception that requires your attention, you will see an Alerts icon at the top of your Navigator when you log in.



Click the Alert icon to see a list of the exceptions. Select an employee from the list to view the details of the exception. The Exceptions widget displays.



The **View All** button opens the Alerts and Notification Widget. This widget is used to view a history of alerts.



Once opened, the alert category can be changed from **Exceptions Alert** to **Request Manager Alert** by selecting the round icons on the widget. Once selected, the icon changes to an orange color. The third icon is for “uncategorized” alerts and is not used.



Details View by Exception Type

To access the Details view by exception type, hover your cursor over the exception type column heading and then click the **Details** button.

<div>Details ></div>		
Lunch Exceptions	Unexcused / Unsched	Holiday Skipped
	10	
	1	
1		

This view shows all employees that have the same type of exception. Note that only dates with exceptions displays on the summary page.

Stamp1, SandyA		<div>View Timecard</div> <div>Show Schedule</div>					
Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Mon 3/03			9:00am	12:00pm			
			1:00pm	5:00pm		7:00	7:00
Tue 3/04			8:00am	12:00pm			
			1:00pm	5:00pm		8:00	15:00
Wed 3/05			8:00am	12:00pm			
			1:00pm	5:00pm		8:00	23:00

The Details View

Details for exceptions can be viewed by employee or by exception type. In either case, the Details view is where exceptions are resolved for non-exempt employees.

Details View for an Employee(s)

Steps	
1	Select Previous Pay Period .
2	Select Junior Manager and Penny Punch . Tip: Hold down the CTRL key to select multiple employee names.
3	Click the View Details button.

Name

Stamp1, SandyA

Manager1, JuniorA

Punch1, PennyA

Exempt1, EdwardA




Newby1, NeilA

View Details (2)

Total:



This view shows all exceptions for the employee(s) selected. Note that only dates with exceptions displays on the summary page.

▼ Punch1, PennyA							
Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Wed 1/01	New Year's Day	8:00				8:00	8:00
Mon 1/06			8:00am	8:02am			
				12:00pm			
			1:00pm	5:00pm		8:00	32:00
Mon 1/13			8:00am	8:02am			
				12:00pm			
			1:00pm	5:00pm		8:00	72:00
▼ Manager1, JuniorA							
Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Wed 1/01	New Year's Day	8:00				8:00	8:00
Thu 1/02			8:00am	12:00pm			
			1:00pm			4:00	12:00
Mon 1/06							70:00


Recognizing common exceptions and visual cues in Time Detail view

The Exceptions widget provides visual indicators to help managers quickly understand time issues that require their immediate attention. The following table summarizes the most common visual cues.

Description	Visual indicator
In or Out punch cell is solid red	Missed or Double punch
In or Out time displays in red text	Early in or out/Late in or out
Date displays in red text	Unexcused absence
In or Out punches are in green text	Punch has been marked as reviewed
In or Out punches are in purple	Punch has been populated by the eSTART system
Date displays in blue text	Excused absence

Examples of the different exception types

Missed In/Out Punch

▼ Manager1, JuniorA							
Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Wed 1/01	New Year's Day	8:00				8:00	8:00
Thu 1/02			8:00am	12:00pm			
			1:00pm			4:00	12:00
Mon 1/06							70:00



Early In/Out Example

Manager1, JuniorA View Timecard

Date	Pay Code	Amount	In	Out	Transfer	Da
Wed 1/01	New Year's Day	8:00				8:
Thu 1/02			8:00am	12:00pm		
			1:00pm			4:
Mon 1/06						
Wed 1/08			7:00am	11:00am		
			12:00pm	4:00pm		8:
Thu 1/09			8:00am			
			1:00pm			4:

Early In
12:00pm
(Mark the punch as reviewed to acknowledge the exception, or if you have the appropriate access rights, double-click the punch to correct it if it was entered erroneously.)

Unexcused Absence Example

Manager1, JuniorA View Timecard

Date	Pay Code	Amount	In	Out	Transfer	
Wed 1/01	New Year's Day	8:00				
Thu 1/02			8:00am	12:00pm		
			1:00pm			
Mon 1/06						
Wed 1/08	Unexcused Absence		7:00am	11:00am		
			12:00pm	4:00pm		
Thu 1/09			8:00am	12:00pm		
			1:00pm			

(Add a pay code edit to record the reason for the absence, or if punches were not entered by mistake, double-click the in punch and the out punch to record the punches if you have the appropriate access rights.)

Double Punch Example

For every In punch there needs to be a corresponding Out punch. Therefore, double-punches are usually identified as a missing punch because the extra punch does not have a corresponding punch.

Exceptions

Time Period Previous Pay Period
Show AL-All Home and Transf...

Summary

Punch1, PennyA View Timecard Show Schedule

Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Mon 3/03			8:00am	8:02am			
				12:00pm			
			1:00pm	5:00pm		8:00	8:00
Mon 3/10			8:00am	8:02am			
				12:00pm			
			1:00pm	5:00pm		8:00	48:00
Tue 3/11			9:00am	1:00pm			
			2:00pm	6:00pm		8:00	56:00
Wed 3/12			8:00am	12:00pm			
			12:30pm	5:00pm		8:30	64:30

Justify Mark as Reviewed Change to Scheduled Comment Add Punch Remove



Action Buttons in the Details View

The following table lists and describes the action buttons you will see in the Exceptions widget. These buttons allow you to resolve exceptions in non-exempt timecards.

Action Button	Description
Save	Saves changes to the database. Button becomes orange when changes have been made but not saved.
Cancel	Cancel changes that you have made prior to saving. Button becomes orange when changes have been made but not saved.
View Timecard	Allows you to view the non-exempt timecard view.
Show Schedule	Allows you to view the employee's schedule.
Mark as Reviewed	Allows you to identify exceptions that have already been addressed. The color of the exception changes to green and the Mark as Reviewed button changes to Unmark as Reviewed.
Change to Scheduled	This feature is not utilized at this time.
Comment	Opens the Add Punch Comment dialog box. Select a comment.
Add Punch	Opens the Add Punch dialog box and allows you to insert punches.
Remove	Allows you to remove punches.
Justify	This feature is not utilized at this time.




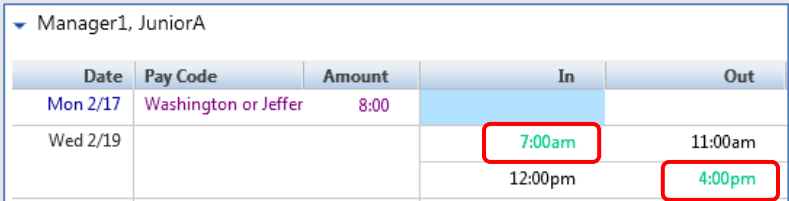
Marking/Unmarking Exceptions as Reviewed

Purpose

Once you have reviewed an exception and resolved it, you can mark the exception as reviewed. The exception will remain visible in the Exceptions widget and timecard, but the text color will be changed to green. At any time, you can choose to unmark an exception as reviewed.

Exercise

On Wednesday of the **previous pay period**, **Junior Manager** arrived early to work because he needed to leave early. Mark the exception as reviewed so it does not have to be checked again.

Steps		
1	In the time detail view, select the cell(s) containing the exception for Junior Manager and Penny Punch . Note: You may hold the Ctrl key and click your mouse to select more than one cell.	
2	To mark an exception as reviewed, click Mark as Reviewed . Note: To unmark an exception as reviewed, click Unmark as Reviewed .	
3	Review the results. Note: Click View Timecard to access the full timecard for an employee.	
4	Click the Save button.	



Attaching Comments to Punches

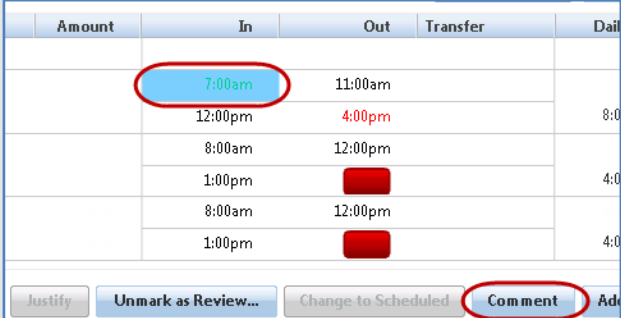
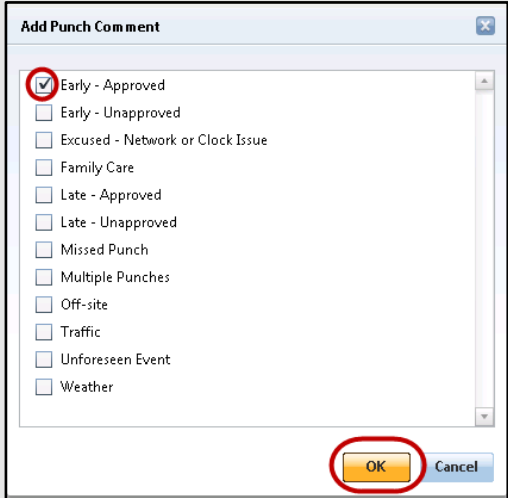

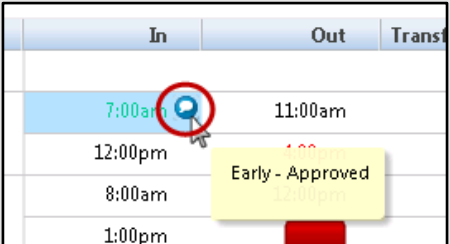
Purpose

Comments are predefined descriptive phrases you attach to a punch to provide additional, useful information about that transaction. You may attach as many comments as needed to explain the punch.

Exercise

On Wednesday of the **previous pay period**, **Junior Manager** arrived early to work because he needed to leave early. You have marked the exception reviewed. Now add a comment that the early arrival was excused. Attach an “Early-Approved” comment to the employee’s 7:00 a.m. punch.

Steps

1	In the time detail view, select the cell containing the exception.	
2	Click Comment .	
3	From the list of comments, click to select the comment(s) you want to add. Note: More than one comment can be selected, if needed.	
4	Click OK .	
5	Click the Save button.	
6	Confirm that the note icon displays in the time detail view. Hover the cursor over the icon to view the comment. Note: Click View Timecard to access the full timecard for an employee.	



Adding Missed Punches

Purpose

An employee might forget to punch in or out. When this happens, a solid-red box displays in the missed In or Out cell. To add that punch, use the Add Punch feature to enter the missed time. The application accepts multiple formats for entering punches in a timecard.

Exercise

Junior Manager notified you that he forgot to punch out on the first Thursday of the **previous pay period**. The employee ended his shift at 5:00 p.m. From the Exceptions Detail view, enter a 5:00 p.m. out punch.

Steps	
1	Select the View Timecard button from the Exception Detail screen.
2	Notice how the exception displays on the timecard. Select the Exceptions Detail back arrow icon to return to the Exception Detail screen.
3	In the time detail view, select the cell containing the exception.
4	Double-click the In or Out cell and enter 5p directly in the cell. Note: you can also use the Add Punch button if desired.

Manager1, JuniorA

Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Mon 2/17	Washington or Jefferson's Birthday	8.00				8.00	8.00
Wed 2/19			7:00am	11:00am		8.00	24.00
Thu 2/20			12:00pm	4:00pm			
			8:00am	12:00pm			
Mon 2/24			1:00pm			4.00	28.00
Thu 2/27							36.00
			8:00am	12:00pm			
			1:00pm			4.00	56.00

Exceptions Details

TIMECARD

Loaded: 8:58AM

Name & ID: Manager1, JuniorA 10301

Time Period: Previous Pay Period

Date	Pay Code	Amount	In	Out	Transfer	Out	Shift	Daily	Cumulative
Sun 2/16								8.00	8.00
Mon 2/17	Washington or J.	8.00						8.00	16.00
Tue 2/18			8:58AM	12:00PM	1:00PM			8.00	24.00
Wed 2/19			7:00AM	11:00AM	12:00PM			8.00	32.00
Thu 2/20			8:00AM	12:00PM	1:00PM			4.00	36.00
Fri 2/21			8:00AM	12:00PM	1:00PM			8.00	44.00

Manager1, JuniorA

View Timecard Show Schedule

Date	Pay Code	Amount	In	Out	Transfer	Daily	Sum
Mon 12/18							
Wed 12/18			7:00am	11:00am		8:00	16:00
			12:00pm	4:00pm			
Thu 12/19			8:00am	12:00pm			
			1:00pm			4:00	20:00
Thu 12/26			8:00am	12:00pm			
			1:00pm			4:00	56:00

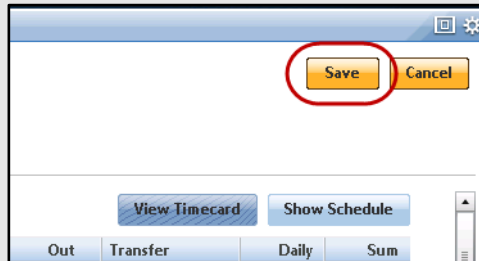
Justify Mark as Reviewed Change to Scheduled Comment **Add Punch** Remove



Steps

- 5 Click **Save**. Confirm that the exception no longer displays in the exception detail view.

If there are no other exceptions for a given day, the day will no longer display in the exceptions detail view when you save.



- 6 Select the **View Timecard** button to review the change to the timecard.



Best Business Practice

You **must** clear all items in the Missed Punch column of the Exceptions Summary view. Administrators will not have the ability to sign off on payroll until all missed punches are corrected.



Tip

You may return to the Exceptions Summary view from the Details view by clicking the back arrow icon in the Details view.





Removing Punches

Purpose



As a rule, you should not remove punches from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For example, an employee might inadvertently punch twice when starting or ending a shift. When this occurs, you will want to remove the extra punch.

Exercise

Penny Punch could not remember if she punched in at the beginning of her shift on Monday of the **previous pay period**. She punched in a second time to ensure that she recorded her start of shift time. While reviewing the employee's exceptions detail, you notice that two In punches display for the employee's start of shift on Monday. You want to remove the employee's second In punch at 8:02 a.m.

Steps

- 1 Select the **View Timecard** button from the Exception Detail screen.

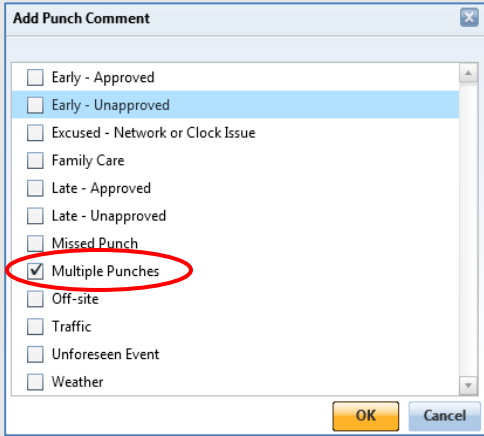
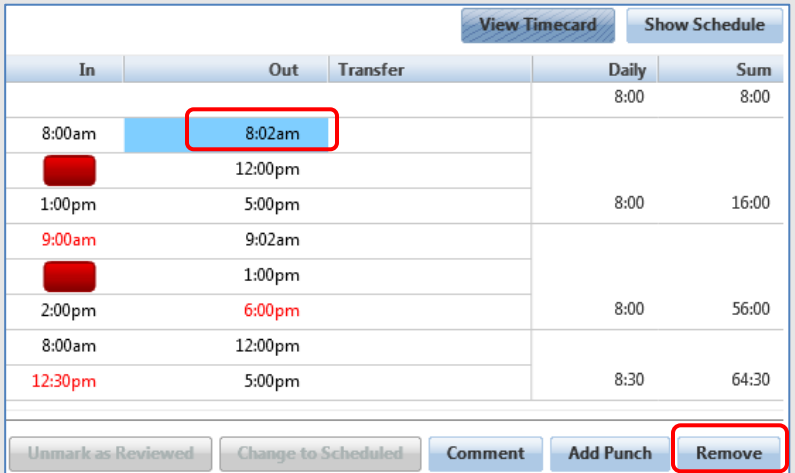
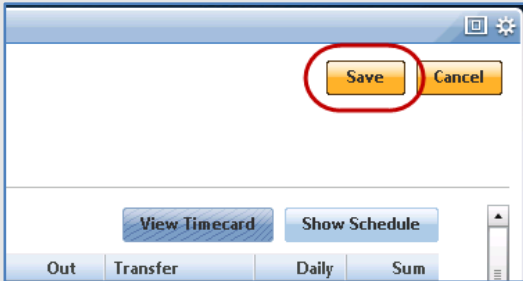
				View Timecard	Show Schedule
In	Out	Transfer		Daily	Sum
				8:00	8:00
8:00am	8:02am			8:00	16:00
	12:00pm				
1:00pm	5:00pm				
9:00am	9:02am			8:00	56:00
	1:00pm				
2:00pm	6:00pm				
8:00am	12:00pm			8:30	64:30
12:30pm	5:00pm				
Unmark as Reviewed		Change to Scheduled		Comment	Add Punch
				Remove	

- 2 Notice how the exception displays on the timecard. The double punch added a new line to the timecard.

Select the **Exceptions Detail** back arrow icon to return to the Exception Detail screen.

										Exceptions Details
TIMECARD										
Loaded: 9:45AM										
Name & ID: Penny, Penny 10201										
Time Period: Previous Pay Period										
Actions	Punch	Amount	Amount	Comment	Approvals	Reports	Leave			
Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Cumulative
Sun 2/18									8:00	8:00
Mon 2/19	Washington or J	8.00								
Tue 2/19			8:00AM		8:02AM			12:00PM	8:00	16:00
Wed 2/19			1:00PM		5:00PM					
Thu 2/20			8:00AM		12:00PM	1:00PM		5:00PM	8:00	24:00
Fri 2/21			8:00AM		12:00PM	1:00PM		5:00PM	8:00	32:00



3	<p>Select the 8:02 punch.</p> <p>Click the Comment button and select Multiple Punches.</p> <p>Click OK.</p> <p>SAVE THE PAGE BEFORE REMOVING THE PUNCH.</p>	
4	Select the 8:02 punch again.	
5	Click Remove .	
6	<p>Click Save. Confirm that the exception no longer displays in the exceptions detail view.</p> <p>If there are no other exceptions for a given day, the day will no longer display in the exceptions detail view when you save.</p>	
7	Select the View Timecard button to review the change to the timecard.	



Using Pay Codes to Track Non-Worked Time

Purpose

Pay codes keep track of the type of worked and non-worked time that is entered. It is important that hours are tracked to the correct pay code so that employees are paid correctly. There are times when you might have to edit an employee's time data and use a pay code to track his or her non-worked time.

Exercise

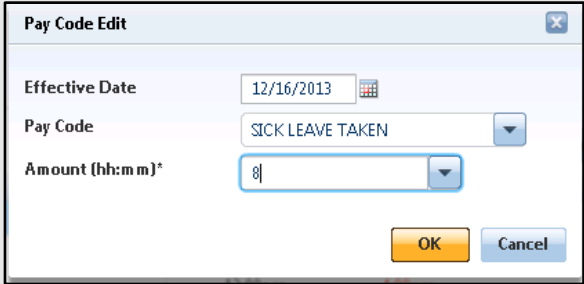
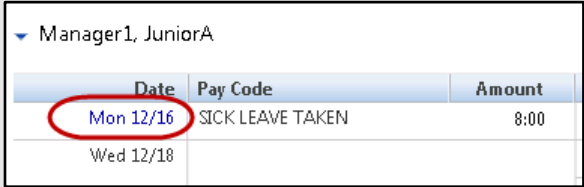
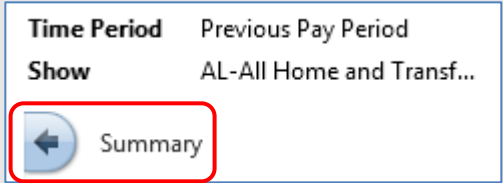

Junior Manager was sick on **Monday of the previous pay period**. His timecard was not updated and eSTART flags the date as an unexcused absence. Edit the employee's timecard for the previous pay period to reflect the sick leave.

Steps

- 1 Access the employee's exception Details view.
- 2 Hover the cursor over the **Pay Code** cell.
- 3 Click the green plus sign.

Manager1, JuniorA		
Date	Pay Code	Am
Mon 12/16		
Wed 12/18		



4	Select the applicable pay code in the Pay Code drop-down list.	
5	In the Amount field, enter the number of hours.	
6	Click OK .	
7	Click Save . Note: The date color will change from red to blue to indicate that the absence is now excused.	
8	Select the Summary back arrow icon to return to the Exception Summary screen.	
9	Click the Refresh icon to update the Exception Summary screen. Notice the exceptions numbers are reduced.	

Acceptable formats for entering pay code hours

Acceptable Format	Example	Interpretation by eSTART
Leading zeroes (optional)	07	7:00 hours
	0830	8:30 hours
Colon	7:30	7:30 hours Note: If you enter hours without a colon or a leading zero, eSTART interprets your entry as is, which may be a much larger number of hours than you intended. For example, if you enter 730 (without the colon or leading zero), eSTART interprets that as 730 hours.
Decimal	8.5	8:30 hours



Editing Time and Attendance Data in the Timecard


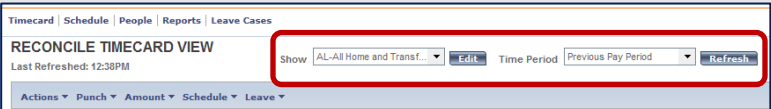
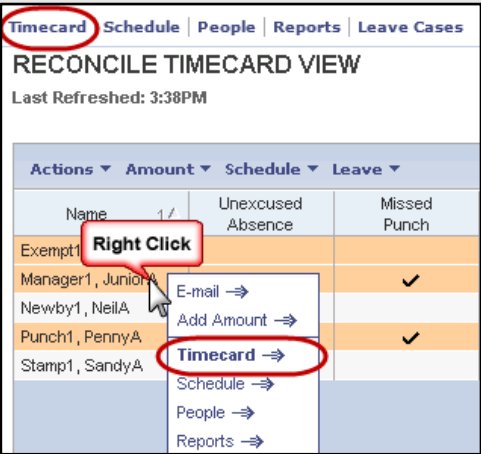
Accessing and Viewing Employees' Timecards

Purpose

The Exceptions widget is not the only way to view employees' time data. Use **Related Items > Reconcile Timecard** to quickly access and review employees' time and attendance data. From **Reconcile Timecard**, you can open employees' timecards and make any needed adjustments prior to payroll processing. Changes to employee time above and beyond what is managed in the Exceptions widget are managed in the non-exempt timecard view.

Exercise

In reviewing Reconcile Timecard, you notice that several employees have time and attendance exceptions. Open each employee's timecard to review and adjust the data.

Steps		
1	From the Related Items pane, select Reconcile Timecard .	
2	In the Show drop-down list, the list defaults to All Home and Transferred-In . From the Time Period drop-down list, select Previous Pay Period .	
3	Select all employees .	
4	Click the Timecard quick link. OR Right-click and select Timecard .	



Steps

- 5 If you selected more than one employee, do one of the following:
- Click the **Next** scroll button to move to the next employee. You can use the **Previous** scroll button to move to a previous employee.
 - Select an employee from the **Name & ID** drop-down list.

The screenshot shows the eSTART interface. The 'Name & ID' drop-down list is open, showing a list of employees: Exempt1, EdwardA; Manager1, JuniorA; Newby1, NeilA; Punch1, PennyA; and Stamp1, SandyA. The 'Next' scroll button (a right-pointing arrow) is circled in red, along with the text '1 of 5'.



Tip

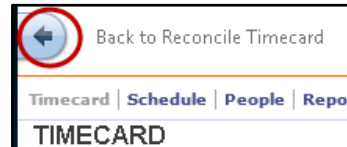
There are various ways to select employees in a eSTART widget:

- Hold the **Ctrl** key and click your mouse to select more than one employee not listed next to the other.
- To select a group of employees listed together, use one of these methods:
 - Click the first employee, then hold the **Shift** key and click your mouse to select the last employee. This will select all employees in-between.
 - Click and drag the mouse to select multiple employees.



Tip

To return to the Reconcile Timecard widget from an open timecard, click the **Back to Reconcile Timecard** arrow icon.





Non-Exempt Timecard Overview

There are three main areas on a timecard: Timecard Header; Timecard Workspace; and Timecard Tabs.

The screenshot displays the eSTART Timecard interface. The **Timecard Header** at the top shows the employee's name and ID (Manager1, Juni... 10301), the time period (Previous Pay Period), and a page indicator (2 of 5). Below the header is the **Timecard Workspace**, which contains a grid for entering time. The grid has columns for Date, Pay Code, Amount, In, Transfer, Out, In, Transfer, Out, Shift, Daily, and Cumulative. The workspace shows data for dates from Mon 12/16 to Wed 12/25, with specific time entries for each day. The **Timecard Tabs** section at the bottom includes tabs for **TOTALS & SCHEDULE**, **LEAVE REPORTING PERIOD VIEW**, and **AUDITS**. The **TOTALS & SCHEDULE** tab is active, showing a table with columns for Account, Pay Code, Amount, Start Time, End Time, Pay Code, and Amount. The table lists entries for HOLIDAY EARNED, HOLIDAY TAKEN, and REGULAR hours.

Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
Mon 12/16			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	8:00
Tue 12/17			7:00AM		11:00AM	12:00PM		4:00PM	8:00	8:00	16:00
Wed 12/18			8:00AM		12:00PM				4:00	4:00	20:00
Thu 12/19			8:00AM		12:00PM				8:00	8:00	28:00
Fri 12/20			8:00AM		12:00PM				8:00	8:00	28:00
Sat 12/21											28:00
Sun 12/22											28:00
Mon 12/23			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	36:00
Tue 12/24	Christmas Eve	8:00								8:00	44:00
Wed 12/25	Christmas Day	8:00								8:00	52:00

Account	Pay Code	Amount	Start Time	End Time	Pay Code	Amount
001/0000/100010/10001/1/1/1	HOLIDAY EARNED	16:00	Tue 12/17	8:00AM	5:00PM	
001/0000/100010/10001/1/1/1	HOLIDAY TAKEN	16:00	Wed 12/18	8:00AM	5:00PM	
001/0000/100010/10001/1/1/1	REGULAR	64:00	Thu 12/19	8:00AM	5:00PM	
			Fri 12/20	8:00AM	5:00PM	
			Sat 12/21			

Timecard Area	Description
Timecard Header	<p>Displays the following information:</p> <ul style="list-style-type: none">Employee's name whose information displays in the timecard workspace and timecard tabs.Employee's identification number.Time period.
Timecard Workspace	<p>Displays the following information:</p> <ul style="list-style-type: none">Menu bar that contains selections for performing timekeeping tasks.Grid containing dates for the selected time period.Time entry totals, including shift, daily, and cumulative hours. <p>Shift Total — Calculated total hours of all shifts worked on the selected day (excluding totals for non-shift items such as pay codes).</p> <p>Daily Total — Calculated total hours of the selected day, including pay codes.</p> <p>Cumulative — Cumulative total up to and including the selected day.</p>
Timecard Tabs	<p>Display additional information about how eSTART tracks employee hours. Three default tabs display:</p> <ul style="list-style-type: none">Totals & Schedule — The area on the left displays the timecard totals. The area on the right displays the Schedule for each day of the selected time period.Leave Reporting Period View — Displays accrual codes and available leave balances based on the date selected.Audits — Lists all edits made to an employee's timecard. <p>Note: Additional tabs display based on actions you perform.</p>



Visual indicators display on a timecard when an exception occurs. For example, an employee might forget to clock in or out, which causes a missed punch exception. An employee might clock in early or late, which causes a punch exception.

***TIMECARD**
Loaded: 4:19PM

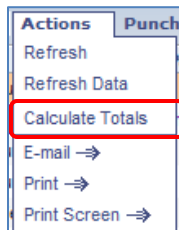
Name & ID: Manager1, Juni... 10301 2 of 2
Time Period: Previous Pay Period

	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
	Wed 1/01	New Year's ...	8:00								8:00	8:00
X	Thu 1/02			8:00AM		12:00PM	1:00PM				4:00	12:00
X	Fri 1/03			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	20:00
X	Sat 1/04											20:00
X	Sun 1/05											20:00
X	Mon 1/06											20:00
X	Tue 1/07			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	28:00
X	Wed 1/08			7:00AM		11:00AM	12:00PM		4:00PM	8:00	8:00	36:00
X	Thu 1/09			8:00AM		12:00PM	1:00PM			4:00	4:00	40:00
X	Fri 1/10			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	48:00

Visual Indicator	Description
Blue-bordered date	An excused absence for the day, such as Annual Leave, Sick Leave, or Jury Duty
Red-bordered date	An unexcused absence for the day
Red-bordered punch	An exception, such as a late or early punch, or a short or long break
Green-bordered punch	Exception has been marked as reviewed
Solid-red cell	A missed punch
Purple	A transaction that was added by the eSTART application
Yellow note icon in the top corner of a cell	One or more comments are attached to the punch

Calculating Totals

To see the effects of a change on the employee's time before saving, use the Calculate Totals feature on the Actions tab.



Refreshing and Saving Data in Timecards

When you add and modify timecard data, eSTART displays your edits but does not save them automatically. You must tell the application to save the data.

Visual Indicator	Description
Timecard title in orange with asterisk	Unsaved edits
TOTALS & SCHEDULE	Red Flag indicates totals are not up-to-date



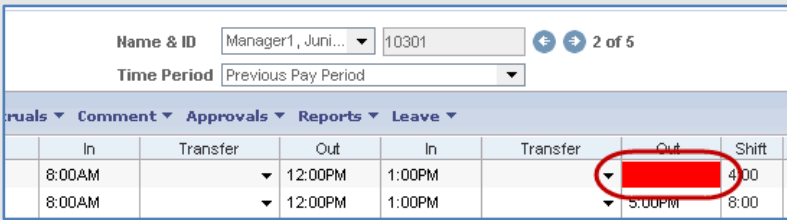
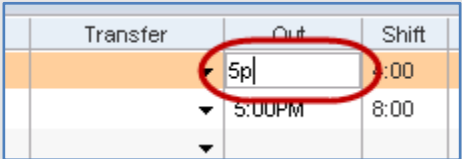
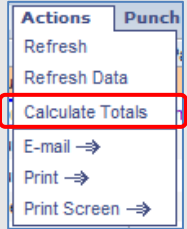
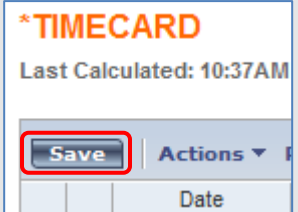
Adding Missed Punches

Purpose

An employee might forget to punch in or out. When this happens, a solid-red box displays in the missed In or Out cell. To add that punch, you click the cell and type the missed time. The application accepts multiple formats for entering punches in a timecard.

Exercise

Junior Manager notified you that he forgot to punch out on the **second Thursday of the previous pay period**. The employee ended his shift at 5:00 p.m. Access the employee's timecard and add a 5:00 p.m. out punch on the employee's timecard for the second Thursday of the previous pay period.

Steps		
1	Access the employee's timecard.	
2	Select Previous Pay Period from the Time Period drop-down list.	
3	Click the Out punch cell containing the missed punch exception.	 <p>The screenshot shows the timecard for 'Manager1, Juni...' with ID '10301'. The 'Time Period' is set to 'Previous Pay Period'. The 'Out' column for the second Thursday of the previous pay period shows a missed punch exception (a solid red box). The 'Shift' column shows '4:00'.</p>
4	Enter 5p or 5pm in the cell. Note: Always use the p or pm when keying time into a cell.	 <p>The screenshot shows the 'Out' column for the second Thursday of the previous pay period. The cell is highlighted in orange, and the text '5p' is entered. The 'Shift' column shows '4:00'.</p>
5	Select Actions > Calculate Totals . Ensure the changes you made are correct. Notice the Daily and Cumulative hours have now updated based on your changes.	 <p>The screenshot shows the 'Actions' menu with the 'Calculate Totals' option highlighted. Other options include 'Refresh', 'Refresh Data', 'E-mail', 'Print', and 'Print Screen'.</p>
6	Once you have determined the timecard/hours are correct select the Save button.	 <p>The screenshot shows the 'TIMECARD' interface with the 'Last Calculated: 10:37AM' timestamp. The 'Save' button is highlighted. Other buttons include 'Actions' and 'Date'.</p>



Best Business practice

You must correct all Missed Punch exceptions on the timecards. Administrators will not have the ability to sign off on the payroll until all missed punches are corrected.



Adding Pay Code Hours to Timecards

Purpose

Pay codes keep track of the type of worked and non-worked time that is entered in the timecard. Examples of pay codes include: Annual Leave, Sick Leave and Personal Leave Day.

It is important that hours are tracked to the correct pay code so that the employee is paid correctly. There are times when you might have to edit an employee's timecard and use a pay code to track his or her worked or non-worked time, for example, when the employee calls in sick.

Acceptable formats for entering pay code hours

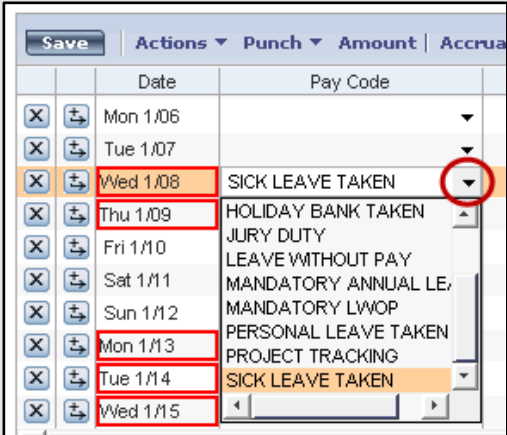
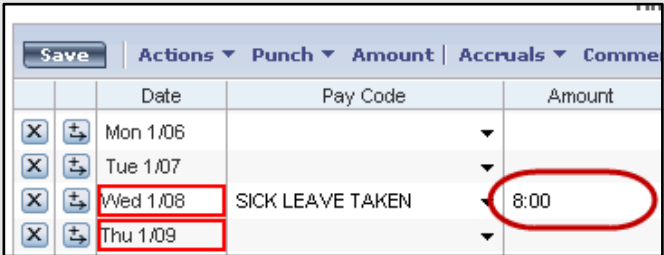
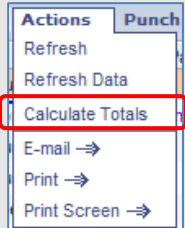
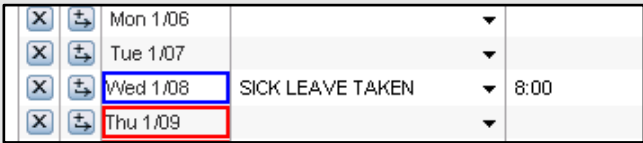
Acceptable Format	Example	Interpretation by eSTART
Leading zeroes (optional)	07	7:00 hours
	0830	8:30 hours
Colon	7:30	7:30 hours Note: If you enter hours without a colon or a leading zero, eSTART interprets your entry as is, which may be a much larger number of hours than you intended. For example, if you enter 730 (without the colon or leading zero), eSTART interprets that as 730 hours.
Decimal	8.5	8:30 hours



Exercise

Junior Manager was sick one day this week. His timecard was not updated to reflect this and eSTART flags him with an unexcused absence. Edit the employee's timecard for the **Current Pay Period** to reflect the sick leave.

Steps

1	In the timecards select the Sick Leave Taken pay code from the Pay Code drop-down list.	
2	Click the Amount cell next to the pay code you selected. Enter the number of hours, using an acceptable format.	
3	Select Actions > Calculate Totals . Ensure the changes you made are correct. Notice the Daily and Cumulative hours have now updated based on your changes.	
4	Once you have determined the timecard/hours are correct select the Save button. Note: If the pay code edit excuses an absence, the red colored border around the date will change to blue.	



Note

You cannot add a pay code to a row that contains punches; you must insert a separate row for the pay code transaction.



Attaching Comments to Punches

Purpose

Comments are predefined descriptive phrases you may attach to a punch to provide additional, useful information about that transaction. You may attach as many comments as needed to explain the punch.

Exercise

On the second Tuesday of the previous pay period, **Penny Punch** arrived late to work because of traffic. You want to add a comment to her 9:00 a.m. punch as a reminder of why she arrived late. Access her timecard and add the Traffic comment to the 9:00 a.m. punch for Tuesday.

Steps

- 1 In the timecard, click the cell that contains the punch to which you want to add a comment.

- 2 Select **Comment > Add Comment**.

Note: You can also right-click the cell and select **Add Comment** from the shortcut menu.

	Date	Pay Code	Amount	Comment	Approvals
X	Thu 12/26		8:00		12:
X	Fri 12/27		8:00AM		12:
X	Sat 12/28				
X	Sun 12/29				
X	Mon 12/30		8:00AM		12:
X	Tue 12/31		9:00AM		1:0

- 3 Select one or more comments from the list.

Tip: Hold the **Ctrl** key to select more than one comment.

- 4 Click **OK**.

- 5 Click **Save**.

Add Comment

Comments

- Early - Approved
- Early - Unapproved
- Excused - Network or Clock Issue
- Family Care
- Late - Approved
- Late - Unapproved
- Missed Punch
- Multiple Punches
- Off-site
- Traffic

OK Cancel Help

- 6 To view comments, click the **Comments** tab at the bottom of the timecard.

Date	Comment
Tue 3/11	Late - Approved
Tue 3/11	Traffic



Marking/Unmarking Exceptions as Reviewed


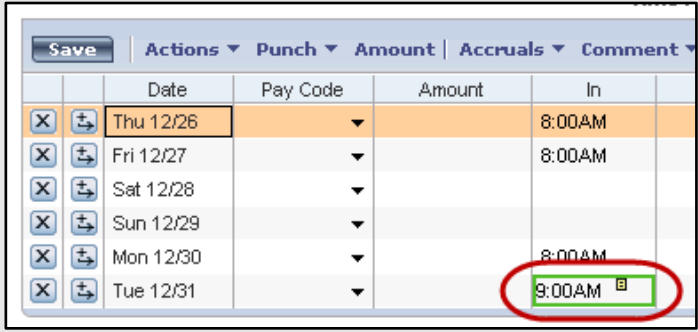
Purpose

Once you review an exception and resolve it you can mark the exception as reviewed. The exception remains visible in the timecard and in customized views, but no longer displays in exception reports or queries. Once the exception is marked as reviewed, a green border displays around the cell containing the exception.

You can unmark an exception as reviewed at any time.

Exercise

On Tuesday, **Penny Punch** arrived late to work because of traffic. You added a comment to her 9:00 a.m. punch as a reminder of the reason for the late punch. Now you want to mark the exception as reviewed so that you do not re-check it again at a later date.

Steps		
1	In the timecard, select the cell containing the exception.	
2	Do you want to mark an exception as reviewed, or unmark an exception as reviewed? <ul style="list-style-type: none">To mark an exception as reviewed, select Punch > Mark as Reviewed.To unmark an exception as reviewed, select Punch > Unmark as Reviewed. Note: You can also right-click the cell and select these options from the shortcut menu.	
3	Review the results.	
4	Save changes.	



Deleting Punches

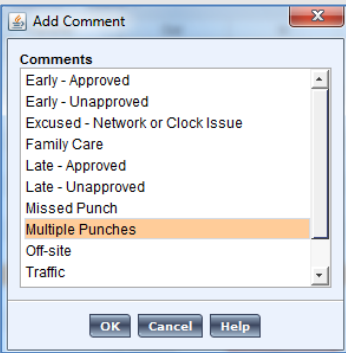
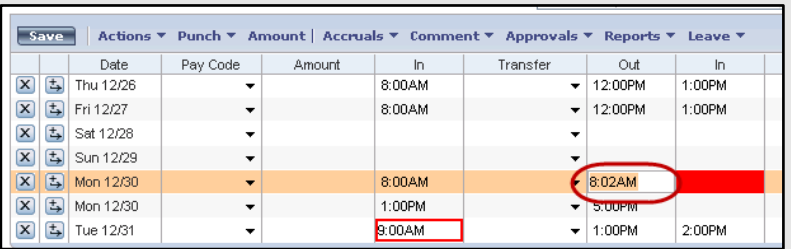
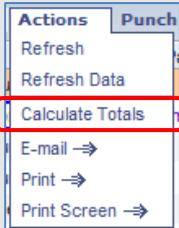
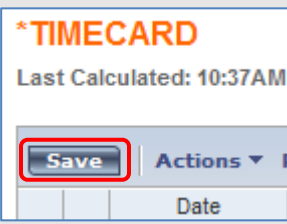
Purpose

As a rule, you should not delete punches from timecards because they represent actual times that employees started and stopped working. However, there are some exceptions to this rule. For example, an employee might punch twice when starting or ending a shift. When this occurs, you should delete the extra punch. The Audits tab provides a record of all timecard edits, including any deleted punches.

Exercise

Penny Punch could not remember if she punched in at the beginning of her shift on the **second Monday of the previous pay period**. She punched in a second time to ensure that she recorded her start-of-shift time. While reviewing the employee's timecard, you notice that two in punches display for the employee's start of shift on Monday. You want to delete the employee's second in punch of 8:02 a.m.

Steps

1	First, select the 8:02 AM punch and add a comment for audit purposes.	
2	Right click and select Add Comment . Select the comment Multiple Punches . Click OK . SAVE THE PAGE BEFORE DELETING THE PUNCH.	
3	In the timecard, click the 8:02am cell.	
4	Press the Delete key on the keyboard.	
5	Select Actions > Calculate Totals . Ensure the changes you made are correct. Notice the Daily and Cumulative hours have now updated based on your changes.	
6	Once you have determined the timecard/hours are correct select the Save button.	

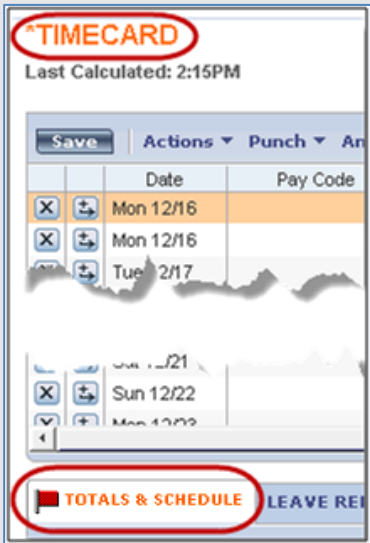
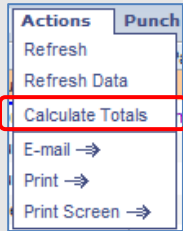
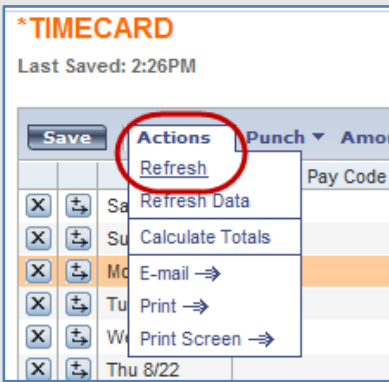


Cancelling Edits

Exercise

You decide not to keep the changes made to an employee's timecard. Instead of saving, you cancel the edit.

Steps

1	Perform one or more edits on a timecard. Notice the visual indicators that indicate unsaved data.	
2	Select Actions > Calculate Totals . Notice the Daily and Cumulative hours have now updated based on your changes.	
2	Select Actions > Refresh .	
3	You will lose any changes you have made if you continue. Do you want to continue? Click Yes to cancel your changes.	



Overriding Punches

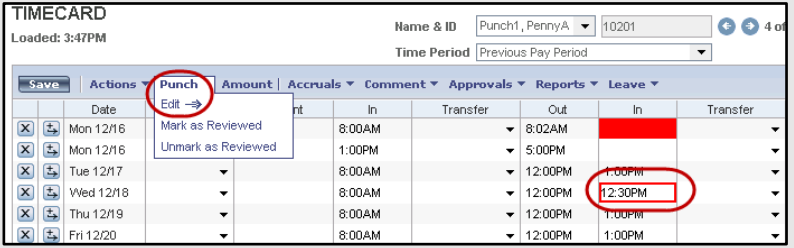
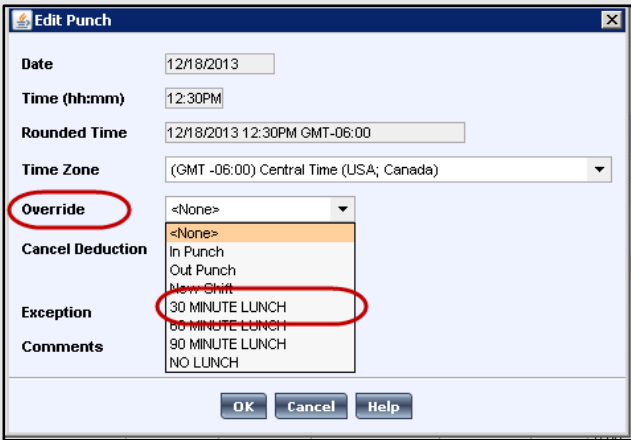
Purpose

When employees punch in or out for their shifts, a punch can be misinterpreted by the system if a punch is missed during the day. An in punch may be interpreted as an out punch or vice versa. It is also possible that an exception related to a lunch break will also be applied if an employee takes a lunch break shorter than their assigned lunch rule. If a punch is incorrectly labeled or a lunch exception is incorrectly applied, you can override the punch to correct the error.

Exercise

You needed **Penny Punch** to return from lunch 30 minutes early on **Wednesday of the previous pay period**, but she normally receives a 60 minute lunch. The system recorded her return punch from lunch as a Short Break exception. To get rid of the exception for this circumstance, you need to override the exception.

Steps

1	In the timecard, select the punch you want to override. Select Punch > Edit .	
2	Select 30 Minute Lunch from the Override drop-down list.	
3	Click OK .	
4	Click Save .	



Steps

5 If the **Override** selection changes a punch's type, verify that the punch is in the correct punch column (**In** or **Out**).

6 If the override was needed because of a missing punch, be sure to correct the missing punch.

7 If the **Override** selection is to change a lunch break, verify that the lunch break exception is removed.

als ▼ Comment ▼ Approvals ▼ Reports ▼ Leave ▼				
In	Transfer	Out	In	
8:00AM	▼	8:02AM		
1:00PM	▼	5:00PM		
8:00AM	▼	12:00PM	1:00PM	
8:00AM	▼	12:00PM	12:30PM	
8:00AM	▼	12:00PM	1:00PM	



Note

Any overtime or compensatory time resulting from this type of exception should be managed according to Agency policy.

Totals and Schedule Tab

Purpose

The Totals and Schedule tab displays the employee's worked and non-worked time for the pay period in the left pane of the screen below. The drop-down box defaults to **All**, but can be changed to **Shift**, **Daily** or **Cumulative** to view totals as needed.

The right pane shows the employee's schedule for the pay period. Any approved leave time will display here as well.

The following illustration shows the **Totals and Schedule Tab**.

TOTALS & SCHEDULE			LEAVE REPORTING PERIOD VIEW		AUDITS			
All			Date		Start Time	End Time	Pay Code	Amount
Account			Pay Code		Amount			
001/0000/100010/10001/-/-			COMP TIME EARNED 1.5		0:30			
001/0000/100010/10001/-/-			HOLIDAY EARNED		8:00			
001/0000/100010/10001/-/-			HOLIDAY TAKEN		8:00			
001/0000/100010/10001/-/-			ANNUAL LEAVE TAKEN		4:00			
001/0000/100010/10001/-/-			COMP TIME EARNED 1.0		4:00			
001/0000/100010/10001/-/-			REGULAR		84:00			
			Thu 1/16		8:00AM	5:00PM		
			Fri 1/17		8:00AM	5:00PM		
			Sat 1/18					
			Sun 1/19					
			Mon 1/20		8:00AM	5:00PM		
			Tue 1/21		8:00AM	5:00PM		
			Wed 1/22		8:00AM	5:00PM		
			Thu 1/23		8:00AM	5:00PM		
			Fri 1/24		8:00AM	5:00PM		
			Sat 1/25					
			Sun 1/26					
			Mon 1/27		8:00AM	5:00PM		
			Tue 1/28		8:00AM	5:00PM		
			Wed 1/29		8:00AM	5:00PM		
			Thu 1/30		8:00AM	5:00PM		
			Fri 1/31		8:00AM	12:00PM		
			Fri 1/31				ANNUAL LEAVE TAKEN	4:00

Description of the columns in the **Totals** section:

Column	Description
Account	The labor level to which the employee is assigned. Further information can be found on this in the employee's people record. (Organization/Department/Work Location/Manager ID)
Pay Code	The pay code to which the worked or non-worked time is assigned. Any overtime or comp time will display here as well.
Amount	The number of hours earned or taken in each pay code.

Description of the columns in the **Schedule** section:

Column	Description
Date	The date of the pay period to which the schedule is assigned.
Start Time	The employee's scheduled start time.
End Time	The employee's scheduled end time.
Pay Code	The pay code which replaces all or a portion of the employee's schedule. Examples of this are Annual Leave, Sick Leave, Personal Day, etc.
Amount	The amount of time associated with the above pay code.



Viewing Accrual Balances in Timecards

Purpose

The Leave Reporting Period View tab displays the employee's accrued time for each accrual code in the employee's assigned accrual profile. You can quickly see up-to-date accrual balances, such as Annual Leave and Sick Leave.

The following illustration shows the **Leave Reporting Period View** tab.

Example

Review the leave balance for Penny Punch.

TOTALS & SCHEDULE LEAVE REPORTING PERIOD VIEW AUDITS						
Accrual Profile AL - NONEXEMPT BENEFIT ELIGIBLE						
Balance as of 5/16/2014 <input type="button" value="Apply"/>						
Type	Balance Range of Dates	Beginning Balance	Planned Usages	Pending Accruals	Ending Balance	
ANNUAL LEAVE	1/01/2014 - 12/31/2014	24.20	13.00	65.00	76.20	
BEREAVEMENT OWED	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
COMP OVERAGE	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
COMP TIME EARNED	1/01/2014 - 12/31/2014	0.45	0.00	0.00	0.45	
ESCROW SICK LEAVE	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
EXCESS ANNUAL LEAVE	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
EXCESS SICK LEAVE	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
HOLIDAY BANKED	1/01/2014 - 12/31/2014	0.00	8.00	8.00	0.00	
HOLIDAY OVER 1 YEAR	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
LWOP - TAKEN	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
MILITARY - FED - TAKEN	1/01/2014 - 12/31/2014	0.00	0.00	0.00	0.00	
PERSONAL DAY	1/01/2014 - 12/31/2014	8.00	0.00	0.00	8.00	
SICK LEAVE	1/01/2014 - 12/31/2014	39.00	13.00	65.00	91.00	

Column	Description
Type	The type of accrual balance, such as Annual Leave or Sick Leave
Balance Range of Dates	The leave reporting period (current year)
Beginning Balance	The accrual balance from the payroll system as of the date in the Balance as of drop-down
Planned Usages	The total amount of time scheduled to be taken, from the Balance as of date through the end of the Reporting Period (12/31)
Pending Accruals	The total accruals projected from the Balance as of date through the end of the Reporting Period (12/31)
Ending Balance	The accrual balance as of December 31 st , including Pending Accruals and Planned Usages



Viewing the Audit Trail

Purpose

The **Audits** tab is located at the bottom of the Timecard workspace. **All timecard changes are logged here for audit purposes, including timecard approval.** The tab also lists punches made from timestamping. You can view all data sources or a specific data source, such as edits to a timecard. Within a timecard, you can view all edits or a specific type of edit, such as punch edits.

Example

Select the timecard of **Junior Manager** in the **Previous Pay Period**.

TIMECARD Name & ID: Manager1, Jun... 10301 2 of 5
Last Saved: 11:20AM Time Period: Previous Pay Period

Save Actions Punch Amount Accruals Comment Approvals Reports Leave

	Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumulative
X	Sun 2/16											
X	Mon 2/17	Washington or J...	8:00								8:00	8:00
X	Tue 2/18			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	16:00
X	Wed 2/19			8:00AM		11:00AM	12:00PM		5:00PM	8:00	8:00	24:00
X	Thu 2/20			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	32:00
X	Fri 2/21			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	40:00
X	Sat 2/22											40:00
X	Sun 2/23											40:00
X	Mon 2/24	SICK LEAVE...	8:00								8:00	48:00
X	Tue 2/25			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	56:00
X	Wed 2/26			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	64:00
X	Thu 2/27			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	72:00
X	Fri 2/28			8:00AM		12:00PM	1:00PM		5:00PM	8:00	8:00	80:00

TOTALS & SCHEDULE LEAVE REPORTING PERIOD VIEW AUDITS

Type of Edit: All Data Sources: All

Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Comment	Edit Date	Edit Time	User	Data Source
2/19/2014	11:00AM	Add Punch							3/04/2014	9:16PM (GMT ...	Import:kronost...	External API
2/25/2014	8:00AM	Add Punch							3/04/2014	9:16PM (GMT ...	Import:kronost...	External API
2/21/2014	5:00PM	Add Punch							3/04/2014	9:16PM (GMT ...	Import:kronost...	External API
2/27/2014	8:00AM	Add Punch							3/04/2014	9:17PM (GMT ...	Import:kronost...	External API
2/21/2014	1:00PM	Add Punch							3/04/2014	9:18PM (GMT ...	Import:kronost...	External API
2/19/2014	4:00PM	Add Punch							3/04/2014	9:18PM (GMT ...	Import:kronost...	External API

Column	Description
Date/Time	The effective date and time of the edit
Type	The type of edit that was performed
Account	The account to which the edit is attributed, if different from the primary account
Pay Code/Amount	The pay code and number of hours assigned, if applicable
Work Rule	The work rule used with the edit, if different from the employee's primary work rule
Override	The type of entry that this edit is replacing or canceling, if applicable
Comment	The comment attached to the edit
Edit Date/Time	The date and time the edit was made
User	The user name of the person who edited the transaction
Data Source	The component of the application where the edit was made



Types of Edits	Description
All	Displays all timecard edits made in the employee's timecard for the selected Time Period
Punch (Add/Edit/Delete)	Displays only timecard edits made to the In or Out punch columns in the employee's timecard for the selected Time Period, including the attachment of comments
Pay Code (Add/Edit/Delete)	Displays only timecard edits made to Pay Code and Amount columns in the employee's timecard for the selected Time Period, including the attachment of comments
Hours Worked (Add/Edit/Delete)	Displays only timecard edits made using the Hours Worked pay code in the employee's timecard for the selected Time Period, including the attachment of comments
Duration (Add/Edit/Delete)	<i>This feature is not utilized at this time.</i>
Approvals/Sign-offs	Displays all employee and manager approvals as well as time period approved, sign-off date and time
Justification (Add/Edit/Delete)	<i>This feature is not utilized at this time.</i>

Exercise

You want to review all manual edits that have been made to **Junior Manager's** timecard.

Steps		
1	From a timecard, click the Audits tab.	
2	Select a type of edit or select All to display all types of edits from Type of Edit drop-down list.	
3	(Optional) Click the Data Sources arrow. <i>It is recommended that "All" remain selected.</i>	

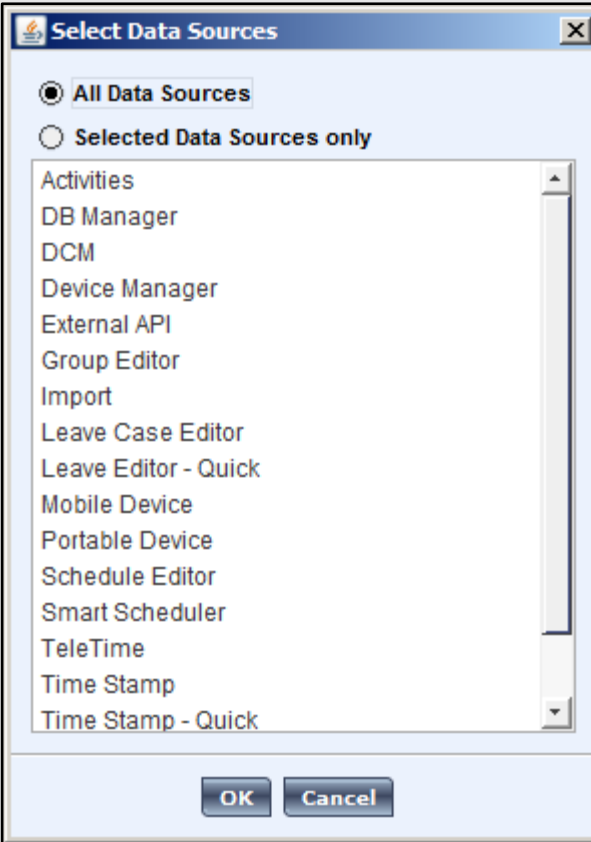


Steps

- 4 In the **Select Data Sources** dialog box, select the source of the edit or leave the default **All Data Sources** to display all edit sources.

It is recommended that "All" remain selected.

Then click **OK**.



The dialog box titled "Select Data Sources" has a close button (X) in the top right corner. It contains two radio buttons: "All Data Sources" (selected) and "Selected Data Sources only". Below the radio buttons is a list box containing the following items: Activities, DB Manager, DCM, Device Manager, External API, Group Editor, Import, Leave Case Editor, Leave Editor - Quick, Mobile Device, Portable Device, Schedule Editor, Smart Scheduler, TeleTime, Time Stamp, and Time Stamp - Quick. At the bottom of the dialog are "OK" and "Cancel" buttons.

- 5 View the results.

TOTALS & SCHEDULE LEAVE REPORTING PERIOD: VIEW AUGUST												
Type of Edit		Data Sources										
Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Comment	Edit Date	Edit Time	User	Data Source
2/10/2014	5:00PM	Add Punch							2/10/2014	11:16PM (GMT)	Import Kronos	External API
2/10/2014	5:00PM	Add Punch							2/10/2014	11:17PM (GMT)	Import Kronos	External API
2/10/2014	12:00PM	Add Punch							2/10/2014	11:17PM (GMT)	Import Kronos	External API
2/10/2014	5:00PM	Add Punch							2/10/2014	11:17PM (GMT)	Import Kronos	External API
2/10/2014	8:00AM	Add Punch							2/10/2014	11:17PM (GMT)	Import Kronos	External API
2/12/2014	5:00PM	Add Punch							2/12/2014	11:18PM (GMT)	Import Kronos	External API
2/14/2014	8:00AM	Add Punch							2/14/2014	11:18PM (GMT)	Import Kronos	External API
2/16/2014	5:00PM	Add Punch							2/16/2014	11:18PM (GMT)	Import Kronos	External API
2/11/2014	2:00PM	Add Punch							2/11/2014	11:19PM (GMT)	Import Kronos	External API
2/11/2014	9:00AM	Edit Punch (Mark							2/11/2014	12:38PM (GMT)	JohnB Manager	Timecard Editor
2/11/2014	8:00PM	Edit Punch (Mark							2/11/2014	12:40PM (GMT)	JohnB Manager	Timecard Editor



Scheduling Employees

Introducing Scheduling

Using the application's scheduling capabilities, you can quickly compare the differences between worked and scheduled time and identify additional workload needs. You can also track employees' absences as well as early or late arrivals. To take full advantage of these capabilities, you need to create, review, and maintain accurate schedules for employees in the application.

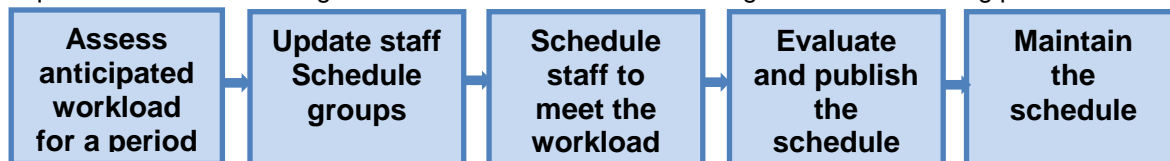
Organizations use schedules for two key reasons: to match staffing to workload requirements and to manage time and labor data for individual employees.

When you manage time and labor data for individual employees with schedules, you can:

- Track attendance.
- Specify how to enforce restrictions and round punches.
- Track exceptions such as when an employee is early, late, or absent.
- Associate work rules with the right schedules.
- Schedule and view non-worked hours, such as annual leave in advance.
- Pre-populate employee timecards with standard schedule information.

Scheduling process

The scheduling process helps you identify whether your employees' schedules meet the workload requirements. The following illustration shows the five main stages in the scheduling process:



Assess workload

Each division has unique staffing needs, which is driven by its workload requirements for a given period. Often managers assess the amount of work that needs to be performed in their division and then evaluate how to meet those demands with their workforce. You typically know your workload before you work with eSTART scheduling.

Update group assignments

New hires can be assigned to a schedule group to provide exception reporting. You can change these initial assignments as your staffing needs change.

Meet workload requirements

After you identify your workload needs for a specific time period, you can assign schedules to employees in your division to meet those needs. Assigning schedules to employees allows you to compare employee work hours to scheduled hours to identify discrepancies and take any necessary action.



Evaluate and publish the schedules

After you finish scheduling your employees for a given period, you need to evaluate the final schedule to ensure that it meets your workload needs for that time period. You can evaluate each employee's total scheduled hours to ensure that the employee meets the requirements. You can also view scheduled hour totals to ensure alignment with your budget and keep overtime to a minimum.

Maintain the schedules

There may be times when you need to change schedules so that the information in eSTART is accurate and your workforce is paid correctly.

Scheduling terms

The following table describes key scheduling terms used in eSTART:

Term	Description
Schedule	The plan for worked and non-worked days for an employee in the past, present, and the future.
Schedule Groups	A way to organize employees for easier and quicker scheduling. Usually employees work the same schedule, but you may also group employees to make it easier to select and sort.
Shift	The time an employee is expected to work. A shift contains a start time and an end time.
Totals	Rows that display the sum of the scheduled hours for all employees, as well as the total number of employees scheduled for the selected time period.



Navigating the Schedule Editor

Purpose

eSTART includes the Schedule Editor where you schedule worked and non-worked hours. Using the Schedule Editor, you can:

- Add, edit, and delete shifts.
- Assign employees to groups.
- Add pay codes for worked or non-worked hours.

SCHEDULE EDITOR
Loaded: 12:48PM

Show Time Period

6/14/2014-6/20/2014

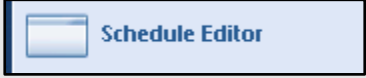

BY EMPLOYEE **BY GROUP**

Name	1 /	Total Pay Status H...	Sch Hrs.	Sat 6/14	Sun 6/15	Mon 6/16	Tue 6/17	Wed 6/18	Thu 6/19	Fri 6/20
Exempt1, EdwardA		40:00	40.00			8a - 5p	8a - 5p	8a - 5p	8a - 5p	8a - 5p
Manager1, JuniorA			40.00			8a - 5p	8a - 5p	8a - 5p	8a - 5p	8a - 5p
Newby1, NeilA			0.00							
Punch1, PennyA			40.00			8a - 5p	8a - 5p	8a - 5p	8a - 5p	8a - 5p
Stamp1, SandyA			0.00							
Scheduled Hours			120.00	0	0	24	24	24	24	
Number of Emplo...			5	0	0	3	3	3	3	

Areas	Description
Name column	Lists the employee names.
Total Pay Status Hours	Displays total number of hours the employee is expected to work for the selected time period based on pay status.
Sch Hrs. column	Displays total number of scheduled hours by employee for the selected time period, with lunch deducted, if applicable.
Date cells	For each day in the selected time period, displays shift start and end times. A date cell can also display pay codes to identify scheduled non-worked hours.
Scheduled Hours row	Displays total number of scheduled hours for all employees for the selected time period and for each date displayed.
Number of Employees row	Displays the total number of employees used to calculate Total Scheduled Hours.



Example

Steps		
1	From the Related Items pane, select Schedule Editor .	
2	From the Show drop-down list, select AL- All Home and Transferred-In to view all the employees you are authorized to view.	
3	Select the specific time period from the Time Period drop-down list. (The default is Current Schedule Period .) Note: A Schedule Period is a one week span of time. A Pay Period is a time period from 1 st – 15 th or 16 th -31 st .	



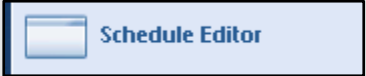
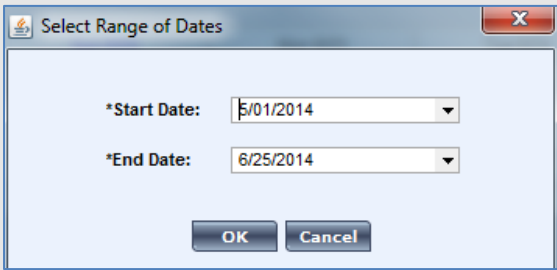
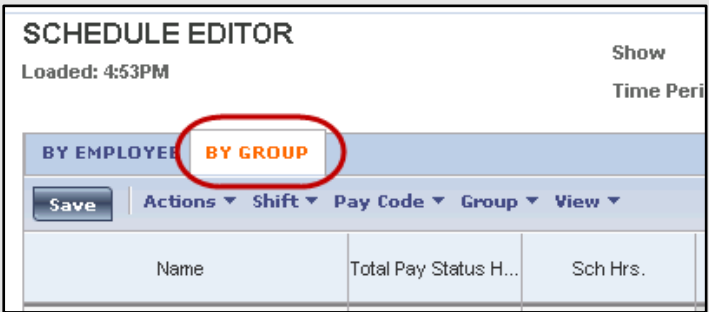
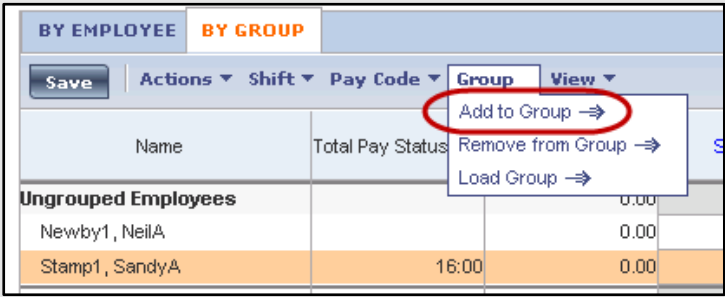
Using Groups to Assign Schedules to Employees

Purpose

When you assign an employee to a schedule group, you specify how long the employee will belong to the group. If there is no defined end to the group assignment, you can indicate that the employee belongs to the group indefinitely.

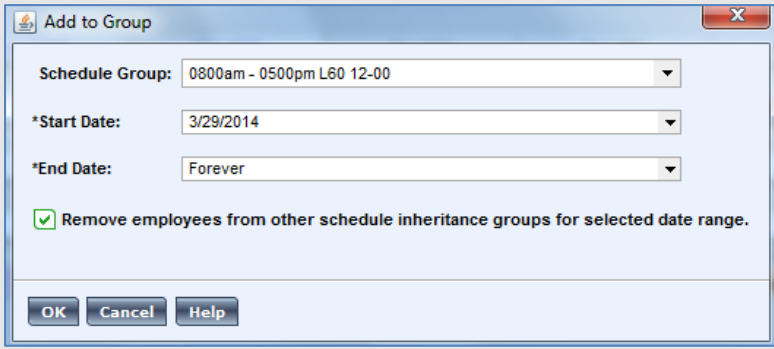
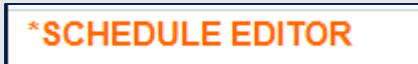
Exercise

Sandy Stamp is not currently assigned to a schedule group. She works 8:00am - 5:00pm with a 60 minute lunch. Therefore, you will assign her to a schedule group effective on previous month with no end date.

Steps		
1	From the Related Items pane, select Schedule Editor .	
2	Select Range of Dates from the Time Period drop down. Choose the <u>first work day of the previous month</u> as the Start Date . The End Date will be today's date.	
3	Select the By Group tab and then select Sandy Stamp .	
4	Select Group > Add to Group .	



Steps

5	From the Schedule Group drop-down list, select the appropriate schedule .	
6	In the Start Date drop-down list, select the effective date for the schedule group assignment.	
7	In the End Date drop-down list, select the last date the schedule group assignment is effective. For the assignment to be in effect with no end date, select Forever .	
8	Leave the check mark selected in the Remove employees from other schedule inheritance groups for the selected date range box.	
9	Click OK . Note: Notice the name of the page is orange in color (as previously discussed) and there is an orange asterisk beside the name. This indicates that changes have not been saved.	
10	Click Save .	



Tip

You may remove an employee from a Schedule Group by selecting **Remove from Group** from the Group menu.



Note

If a schedule group is needed, (not in list) contact your Agency Administrator to have it added.



Adding or Editing Shifts Using the Shift Editor

Purpose

When creating and editing more complex schedules, use the Shift Editor. It has tools that make it easier for you to create and edit shifts with several segments, shifts with transfers, shifts that cross the day divide, and other complex shifts.

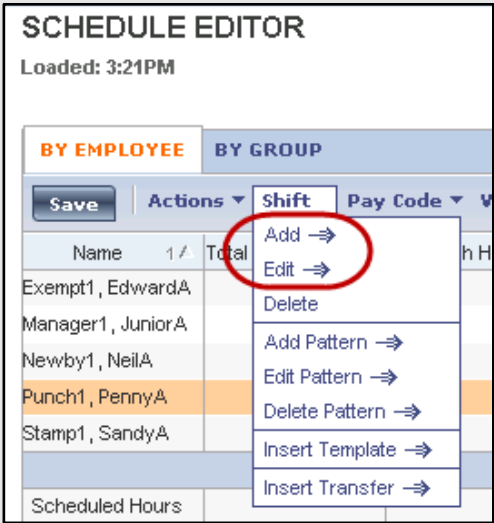
Exercise

On Monday of the next schedule period, you need **Penny Punch** to work the following shift segments:

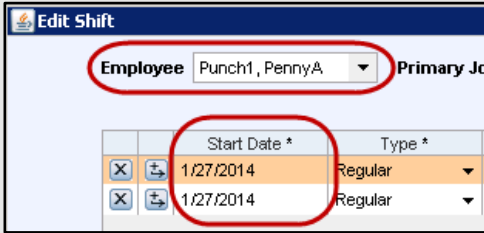
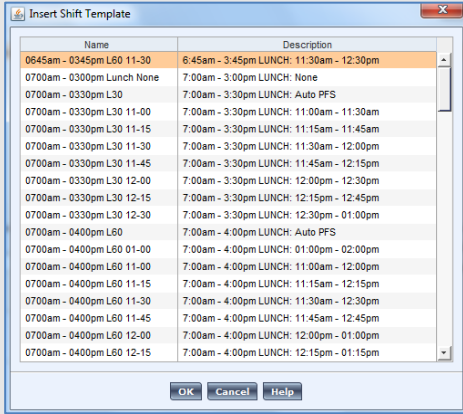
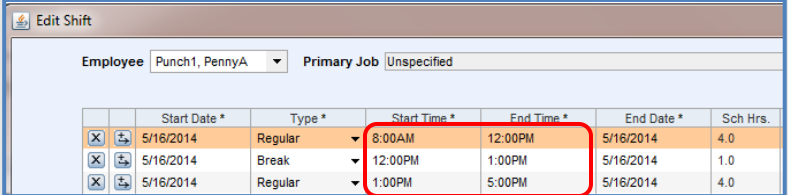
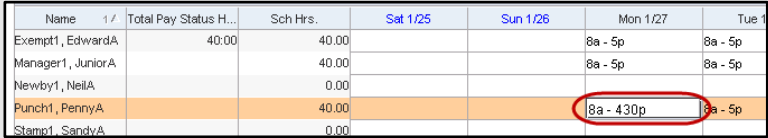
- Regular shift from 8:00 a.m. to 12:00 p.m.
- Lunch break from 12:00 p.m. to 12:30 p.m.
- Regular shift from 12:30 p.m. to 4:30 p.m.

Use the Shift Editor to add or edit the shift to her schedule for **Monday of the next schedule period**.

Steps

1	From the Related Items pane, select Schedule Editor .	
2	From the Show drop-down list, select the specific set of employees. From the Time Period drop-down list, select Next Schedule Period .	
3	From the Employee tab, highlight the row with Penny Punch . Click the cell where you want to add a shift.	
4	Select Shift > Edit . Note: If the cell does not contain an existing shift, select Shift > Add .	

**Steps**

5	In the Shift Editor, confirm that the correct employee's name displays in the Employee field and the correct scheduling date displays in the Start Date field.	
6	Is there already a shift displayed? No – Go to step 7 Yes – Go to step 8	
7	Click Insert Shift . Select the appropriate shift template and click OK . Go to step 9.	
8	To modify her existing shift to allow 30 minutes for lunch and to leave 30 minutes early, edit the Regular End time to 12:30p Lunch Start Time to 1230p Shift End Time to 430p.	
9	Click OK and then click Save .	

**Note**

Another method for adding the shift is to click in the cell and manually key the shift times, i.e. 8a-5p, 730a-430p.

**Tip**

Enter time using a 12-hour format with either **am/pm** or **a/p** abbreviations. For example, you can enter 8:00 a.m. to 5:00 p.m. or 8a-5p. You can also copy and paste shifts using **Ctrl-C** and **Ctrl-V**.



Deleting Shifts from Employees' Schedules

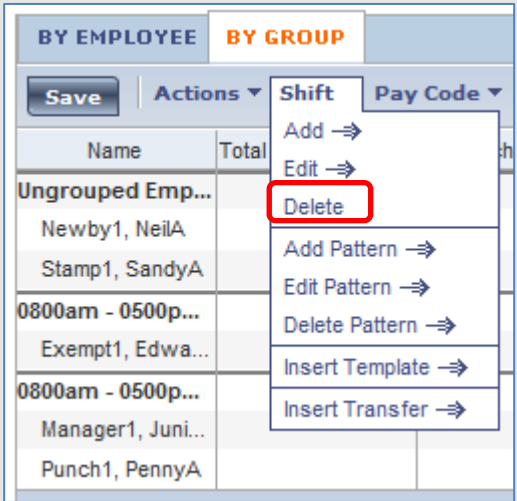
Purpose

Sometimes an employee is unable to work a scheduled shift. When this happens, you need to delete the shift from the employee's schedule to prevent the application from flagging the absence as unexcused.

Exercise

Penny Punch, who is currently scheduled to work on Tuesday of the next schedule period, will not be working on Tuesday. Access the Schedule Editor and delete her schedule for **Tuesday of the next schedule period**.

Steps

1	From the Related Items pane, select Schedule Editor .	
2	From the Show drop-down list, select the specific set of employees. From the Time Period drop-down list, select Next Schedule Period .	
3	Locate Penny's row and click the cell in the row under the date that contains the shift you want to delete.	
4	Select Shift > Delete or press the Delete button on the keyboard to remove the shift.	
5	Click Save .	



Scheduling Non-Worked Hours

Purpose

Non-worked hours include time such as sick leave, annual leave, or jury duty. You should schedule your employees' non-worked time when you are made aware of the non-work time.

Exercise

Penny Punch has been called to serve jury duty on **Thursday** of the **Current Schedule Period**. Because you know about it in advance, you want to schedule the time so that you do not forget.

Steps

- 1 From the **Related Items** pane, select **Schedule Editor**.
- 2 From the **Show** drop-down list, select **All Home**. From the **Time Period** drop-down list, select **Current Schedule Period**.
- 3 Locate **Penny's** row and click the cell in the row where you want to schedule non-worked hours.
- 4 Select **Pay Code > Add**.

SCHEDULE EDITOR
Loaded: 3:30PM

BY EMPLOYEE **BY GROUP**

Save **Actions** **Shift** **Pay Code** **View**

Name	1 /	Total Pay Statu	Pay Code	View
Exempt1, EdwardA				0.00
Manager1, JuniorA				0.00
Newby1, NeilA				0.00
Punch1, PennyA				0.00
Stamp1, SandyA				0.00

Dropdown menu options: Add =>, Edit =>, Delete, Add Pattern =>, Edit Pattern =>, Delete Pattern =>



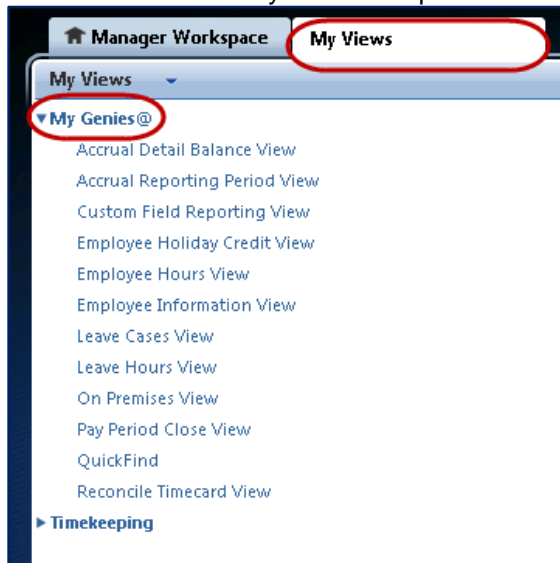
Reviewing Employee Data in eSTART

Purpose

eSTART pages present customized views of employee information in a summarized, easy-to-read format so that you can quickly analyze and respond to time, labor and scheduling needs.

My Genies

Information found in the My Genies drop-down.

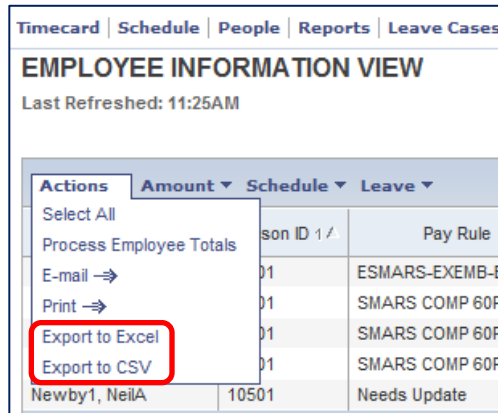


View	Description
Accrual Detail Balance View	Employee leave ending balances for each leave type.
Accrual Reporting Period View	Employee accrual leave balances, pending usages, pending accruals and ending balances, by employee.
Custom Field Reporting View	Includes employee information for pay rules, scheduled group, lunch, employee type, approver, current or arrears.
Employee Holiday Credit View	Holiday Earned and Holiday Taken hours by employee.
Employee Hours View	Employee hours: Regular and Non-Worked, Comp and OT.
Employee Information View	Includes employee information for pay rules, labor account, hire date, employment terms, current or arrears, scheduled group, assigned manager
Leave Cases View	Includes leave reasons, leave frequency, leave case status, leave category, initial leave request date
Leave Hours View	Includes total leave hours, leave case status, last date of committed paid and unpaid leave time, leave end date (if one is provided)
On Premises View	Non-exempt employees currently at work
Pay Period Close View	Final review of your employee time records, displays indicators for employee and manager approvals.
QuickFind	Locate an employee by the name or ID
Reconcile Timecard	Display exceptions, Holiday skipped, and totals up to date.




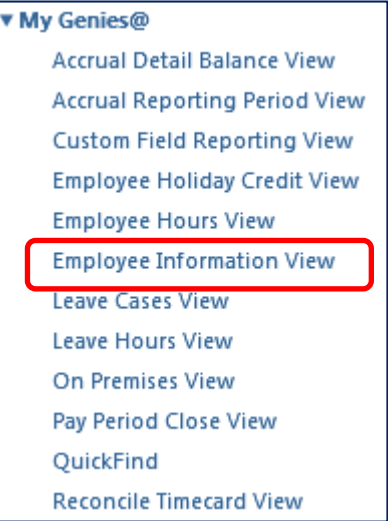
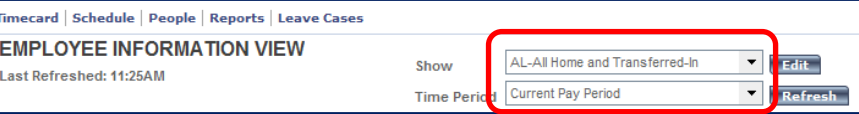
Note

You can also export the data to an Excel (.xls) or CSV (Comma Separated Value) file to make it available to other applications such as Excel.



Exercise

You want to look at how your employees are set up in eSTART.

Steps		
1	From the Related Items pane, select My Views .	
2	Open the My Genies drop-down and choose Employee Information View .	
3	From the Show drop-down list, select AL-All Home and Transferred-In . From the Time Period drop-down list, select Current Pay Period .	

**Steps**

- 4 To sort information by one or two columns, click the column for the secondary sort first, and then click the column for the primary sort.

EMPLOYEE INFORMATION VIEW

Last Refreshed: 11:25AM

Actions ▾ Amount ▾ Schedule ▾ Leave ▾

Person Name 2 /	Person ID 1 /	Pay Rule
Exempt1, EdwardA	10101	ESMARS-EXEMB-EXEMP...
Punch1, PennyA	10201	SMARS COMP 60P
Manager1, JuniorA	10301	SMARS COMP 60P
Stamp1, SandyA	10401	SMARS COMP 60P
Newby1, NeilA	10501	Needs Update

Review the information from Employee Information View.

EMPLOYEE INFORMATION VIEW

Last Refreshed: 12:52PM

Show

AL-All Home and Transf...

Edit

Time Period

Current Pay Period

Refresh

Actions ▾ Punch ▾ Amount ▾ Schedule ▾ Leave ▾

Person Name 1 /	Person ID	Pay Rule	Primary Labor Account N...	Hire Date	Employment Terms	Current or Arrears	Schedule Group	Assigned Manager
Exempt1, EdwardA	10101	ESMARS-EXEMB-EXEMP...	001/0000/100010/10001/...	1/01/2013	8 Fixed Holiday - Exempt	Arrears	0800am - 0500pm L60 00-Auto PFS	Manager1, JohnA
Manager1, JuniorA	10301	SMARS COMP 60P	001/0000/100010/10001/...	1/01/2013	8 Fixed Holiday	Arrears	0800am - 0500pm L60 12-00	Manager1, JohnA
Newby1, NeilA	10501	Needs Update	001/0000/-/10001/-/-/-	1/01/2013				Manager1, JohnA
Punch1, PennyA	10201	SMARS COMP 60P	001/0000/100010/10001/...	1/01/2013	8 Fixed Holiday	Arrears	0800am - 0500pm L60 12-00	Manager1, JohnA
Stamp1, SandyA	10401	SMARS COMP 60P	001/0000/100010/10301/...	1/01/2013	8 Fixed Holiday	Arrears		Manager1, JuniorA

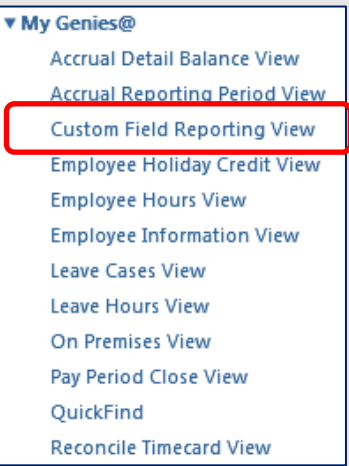
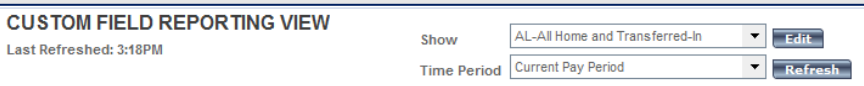
Column	Description
Pay Rule	Indicates how an employee earns time (i.e. Exempt vs. Non Exempt, Overtime\Comp Time, etc.)
Primary Labor Account	Employees Agency, Org, Work Location, and Approver ID
Employment Terms	Indicates if an employee qualifies for Holidays
Current or Arrears	Indicates if an employee is paid current or in arrears
Schedule Group	Indicates the schedule group an employee belongs to

Note: Notice that Neil Newby's information is incomplete. The Pay Rule column displays "Needs Update" and other information is missing.



Exercise

Research **Neil Newby** discussed above to troubleshoot his setup in the system.

Steps	
1	<p>Choose Custom Field Reporting View.</p> 
2	<p>From the Show drop-down list, select AL-All Home and Transferred-In.</p> <p>From the Time Period drop-down list, select Current Pay Period.</p> 

Review the information from Custom Field Reporting View.

Timecard Schedule People Reports Leave Cases										
CUSTOM FIELD REPORTING VIEW										
Last Refreshed: 11:51AM										
Show AL-All Home and Transf... Edit Time Period Current Pay Period Refresh										
Actions Punch Amount Schedule Leave										
Person Name	1 /	Person ID	Pay Rule	Schedule Group	Lunch	Employee Type	Approver	Current Arrears	OT Comp	
Exempt1, EdwardA	10101		ESMARS-EXEMB-EXEMP-UNCLA 60A	0800am - 0500pm L60 00-Auto PFS	60	8T	10001	Arrears	Comp	
Manager1, JuniorA	10301		SMARS COMP 60P	0800am - 0500pm L60 12-00	60	8T	10001	Arrears	Comp	
Newby1, NeilA	10501		Needs Update							
Punch1, PennyA	10201		SMARS COMP 60P	0800am - 0500pm L60 12-00	60	8T	10001	Arrears	Comp	
Stamp1, SandyA	10401		SMARS COMP 60P		60	8T	10301	Arrears	Comp	

Column	Description
Pay Rule	Indicates how an employee earns time (i.e. Exempt vs. Non Exempt, Overtime\Comp Time, etc.)
Schedule Group	Indicates the schedule group an employee belongs to
Lunch	Indicates the length of an employee's lunch period
Employment Type	Indicates the number and type of hours for an employee (i.e. 8T is 8 Hours with a Traditional Schedule)
Approver	Person ID of the employee's manager
Current or Arrears	Indicates if an employee is paid current or in arrears
OT Comp	Indicates if a Non Exempt employees Comp versus Overtime

Notice that **Neil Newby's** information is incomplete. The **Pay Rule column displays "Needs Update"** and other information is missing. Contact your Agency Administrator to have these fields corrected.



Locating Employees Using QuickFind

Purpose

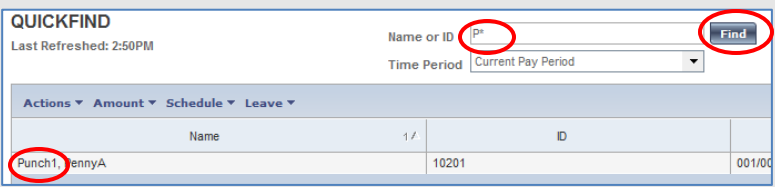
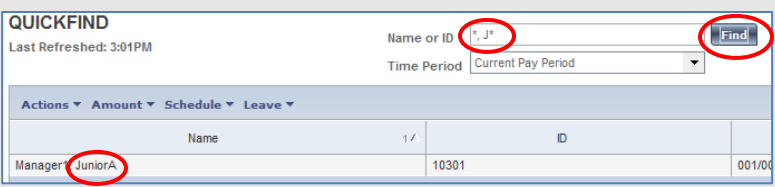
When an employee notifies you about an issue with his or her timecard, you can use QuickFind to access the employee's timecard. You can use other eSTART customized views to access timecards, but this page is designed to help you locate an employee by the name or ID. If you are unsure of the spelling of an employee's name or know only some of the digits in an employee's ID number, you can include wildcard characters to help you find the employee with only partial information.

Wildcard Character	Description	Example
? —	A question mark or underscore indicates a single character occupies a position in the search string.	10?? finds all employees whose ID contains 4-digit numbers starting with 10. Sm_th finds all employees whose last name starts with "Sm" and ends with "th" and has one letter in the center.
* %	An asterisk character or a percent symbol indicates multiple characters can occupy a position in the search string.	*, s* finds all employees whose first name begins with the letter S. %1 finds all employees whose ID number ends with the number 1.

Access QuickFind from the Related Items pane

Exercise

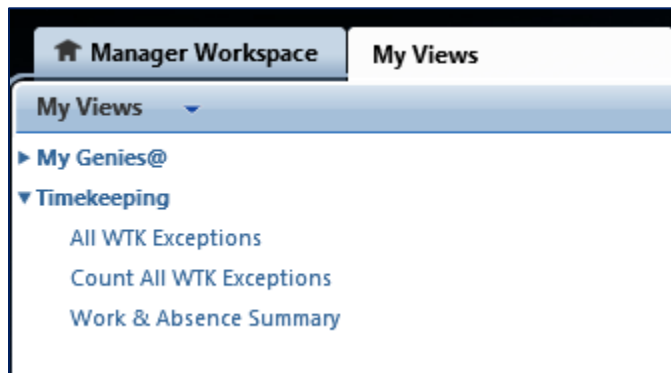
You need to review the timecards for **Junior Manager** and **Penny Punch**. To quickly access Penny's timecard, access **Related Items > QuickFind** and search for all employees whose last name begins with "**P**". Then try searching for Junior's timecard by searching for employees whose first names begin with "**J**".

Steps		
1	From the Related Items pane, select Quick Find .	
2	Enter your search criteria in the Name or ID box. <ul style="list-style-type: none">To search by last name, enter P*	
3	Click Find .	
4	Enter your search criteria in the Name or ID box. <ul style="list-style-type: none">To search by first name, enter *,<space> J*	
5	Click Find.	



Timekeeping

Other useful information can be found in the **Timekeeping** drop-down.



Areas	Description
All WTK Exceptions	This view allows viewing of all timekeeping exceptions for your employees. It contains all possible exceptions in the system. Not all will be used by the State. Reconcile Timecard is preferable to view existing exceptions.
Count All WTK Exceptions	This view allows viewing of the number of exceptions for each type. Again, this view contains all possible exceptions in the system. Most will not be used by the State. The Exceptions widget is preferable to view the number of exceptions.
Work & Absence Summary	This view allows you to identify trends or patterns in worked and scheduled time off for employees in calendar view.



Using the Work & Absence Summary Calendar

Purpose

You can use the Work & Absence Summary calendar to identify trends in worked and time off events for employees. The calendar-like display makes it easy for you to see whether an employee has a pattern of taking time off or of arriving late on a specific day of the week. You can see trend information such as the following:

- Number of days the employee has arrived late to work or left early
- Number of Mondays the employee has taken sick or annual leave
- Days the employee has submitted leave requests
- Days the employee has missed punches

WORK & ABSENCE SUMMARY

Show: AL-All Home and Transferred

Name & ID: Stamp1, SandyA

Refresh

Day Detail

Legend

Time Period: Previous Month 2/01/2014 – 2/28/2014

Apply


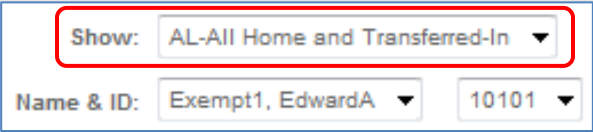
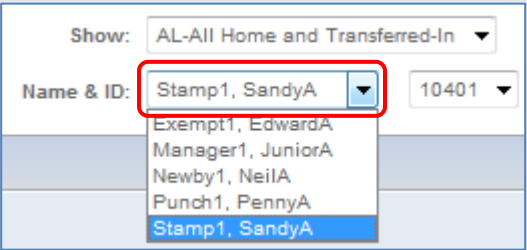
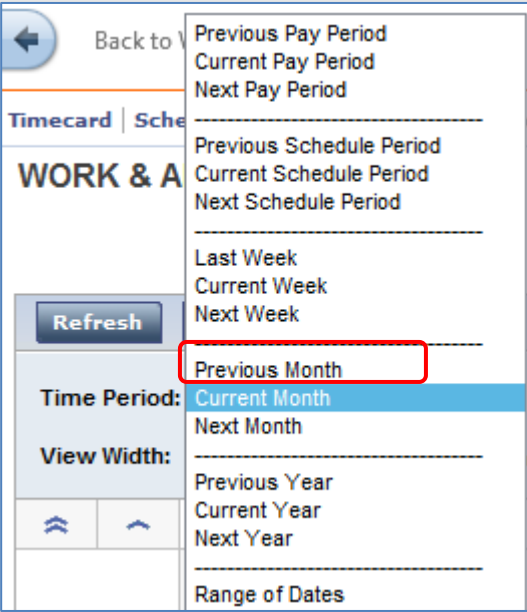
View Width: ☒ Week ☐ Month ☐ Multiple Months

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	26	27	28	29	30	31	1	
	2	3 Late In	4	5	6	7	8	
	9	10 Late In	11	12	13	14	15	
Feb	16	17 HOLIDAY TAKEN 8:00	18 Late In	19	20	21	22	
	23	24 Late In	25	26	27	28	1	



Exercise

You are scheduled to deliver a performance review with an employee this week. Prior to the meeting, you would like to research the employee's calendar for the year. Access the Work & Absence Summary calendar to review the employee's attendance.

Steps		
1	From the Related Items pane, select Work and Absence Summary .	
2	Select a group of employees from the Show list.	
3	Select an employee from the Name & ID list.	
4	Select the Previous Month from the Time Period drop-down list.	



Steps

- 5 Select the **View Width** option to review attendance events in a weekly calendar, monthly calendar, or in multiple months. Click **Apply**.
- For example, to see how many attendance events the employee has over a month, select **Month** and then click **Apply**.

Refresh Day Detail Legend

Time Period: Previous Pay Period 1/01/2014 - 1/15/2014

View Width: ☒ Week ☐ Month ☐ Multiple Months

Apply

- 6 (Optional) Select one or more days and click **Day Detail** for more detailed information.

Day Detail Legend

Time Period: Previous Pay Period 1/01/2014 - 1/15/2014

View Width: ☒ Week ☐ Month ☐ Multiple Months

FRIDAY, JANUARY 10, 2014

TIMEKEEPING

Late In

1:00PM In

Missed Out-Punch

OK

- 7 (Optional) To see a legend of all color and visual indicator meanings, click the **Legend** button.

eSTART State of Alabama John A. Manager 1 Sign Out

Manager Workspace Work and Absence

Work and Absence Summary

Back to Work and Absence Summary

Timecard | Schedule | People | Reports

WORK & ABSENCE SUMMARY

Refresh Day Detail Legend

Time Period: Previous Pay Period 1/01/2014 - 1/15/2014

View Width: ☒ Week ☐ Month ☐ Multiple Months

Calendar Legend - Windows Internet Explorer

SCHEDULING

Appearance	Name
Text 8:00 (x)	SICK LEAVE TAKEN
Text 8:00 (x)	ANNUAL LEAVE TAKEN
OS (Draft)	Time Off Request
Text 8:00 (x)	PERSONAL LEAVE TAKEN
Text 8:00 (x)	COMP TIME TAKEN
Text 8:00 (x)	LEAVE WITHOUT PAY
Text 8:00 (x)	HOLIDAY BANK TAKEN

TIMEKEEPING

Appearance	Name
Text	No items selected in Data Element Setup. Data Element Name: All Timecard Comments
Text	Early In, Late In, Early Out, Late Out, Absence, Short Break, Unscheduled
Text	Cancel Deduction, Core Hours Violation, Very Early In, Early In, Late In, Early Out, Late Out, Very Late Out, Short Break, Long Break, Short Shift, Long Interval, Unscheduled
Text	Missed In-Punch, Missed Out-Punch
Text 8:00 (x)	SICK LEAVE TAKEN
Text 8:00 (x)	ANNUAL LEAVE TAKEN
Text 8:00 (x)	PERSONAL LEAVE TAKEN
Text 8:00 (x)	HOLIDAY TAKEN
Text 8:00 (x)	COMP TIME TAKEN
Text 8:00 (x)	HOLIDAY BANK TAKEN
Text 8:00 (x)	LEAVE WITHOUT PAY



Reviewing Time and Attendance Data

Using the Inbox to View/Send Messages

The Inbox allows you to manage tasks and email messages sent via eSTART. In particular, the Messages tab allows you to create, read, reply to, and delete messages using eSTART's internal messaging system. Employee requests for leave are one example of a typical message managers will receive.

From	Subject	Received
Exempt1, Edw ardA	Exempt1, Edw ardA Leave Request 1870 starting on 01/21/2014 thru 01/21/2014	12/31/2013 8:00AM (GMT -06:00) Central Time

Exercise

Steps

1	From the Related Items pane, select My Inbox .	
2	From the Messages tab, select the message you want to review and click Open .	
3	What do you want to do? <ul style="list-style-type: none">Click Close to close the message.Click Reply to compose a message.Click Delete to remove the message from the Inbox.Click Print to send the message to a printer.Click Help to access online help for this feature.	



Note: Users who have an Outlook email account will also receive these messages in their Outlook mailboxes.



Generating Reports

Purpose

You can generate reports on a daily, weekly or pay period basis, or any time you need information to accomplish your business tasks.

Exercise

For auditing and validation purposes, you want to review all your employees' timecard hours and totals for the pay period in a report format. Select the **Time Detail** report to review this information.

Steps

- 1 From the **Related Items** pane, select **Reports Manager**.

Note: You may also run a report for a specific set of employees by selecting the employees in a customized view and clicking the **Reports** quick link.

 **Reports Manager**

[Timecard](#) | [Schedule](#) | [People](#) | **[Reports](#)** | [Leave Cases](#)

RECONCILE TIMECARD VIEW

Last Refreshed: 4:48PM

Actions ▾ Amount ▾ Schedule ▾ Leave ▾		
Name 1 /	Unexcused Absence	Missed Punch
Exempt1, EdwardA		
Manager1, JuniorA	✓	✓
Newby1, NeilA		
Punch1, PennyA		✓



Steps

- 2 From the **Select Reports** tab, click the plus (+) to display a category's contents.

- 3 Click a report name.
- Note:** A description of the report displays at the top of the page.

- 4 Select **AL-All home and Transferred-In** from the **People** drop-down list.

- 5 Select **Current Pay Period** from the **Time Period** drop-down list.



Steps

6 Select one or more available options to identify the report information you need.

Note: Options may vary by report.

Page Break between Employees: No

Actual/Adjusted: Show hours credited to this period only.

Output Format: Adobe Acrobat Document(.pdf)

7 Select an **Output Format**.

Note: Reports that have (Excel) at the end of their names allow you to run the report in **Microsoft Excel Document (.xls)** format. All other reports can only be run in **Adobe Acrobat Document (.pdf)** format.

8 To generate a report, click **Run Report**.

REPORTS

SELECT REPORTS | CHECK REPORT STATUS

Run Report Refresh

Create Favorite Save Favorite Duplicate Favorite Delete Favorite

9 After selecting **Run Report**, the **Check Run Status** tab displays.

The **Status** column displays **Waiting**.

Click **Refresh Status**.

The **Status** column displays **Complete** or **Failed** once the application has finished the report.

REPORTS

SELECT REPORTS | CHECK REPORT STATUS

View Report Refresh Status Delete

Report Name	Format	Date In	Date Done	Status
Time Detail	pdf	9/04/2013 12:55PM		Waiting

Report Name Format Date In Date Done Status

Time Detail pdf 9/04/2013 12:55PM 9/04/2013 12:55PM Complete

10 Once **Status** is **Complete**, click on the report name to highlight it and do any of the following:

- To use menu options, click **View Report**.
- Or double-click the report name to view.

REPORTS

SELECT REPORTS | CHECK REPORT STATUS

View Report Refresh Status Delete

Report Name	Format	Date In	Date Done
Time Detail	pdf	9/04/2013 12:55PM	9/04/2013 12:55PM



Steps

- 11 (Optional) While viewing the report, you can do any of the following:
- To print the report to a local printer, select the **Print** button from the menu that displays on the report.
 - To send a report in an e-mail message, select **File > Send > Page by E-mail**, and complete the e-mail message contained in your default e-mail client.

Here is an example of a Time Detail report.

Time Detail											
Time Period:		8/16/2013 - 8/31/2013				Data Up to Date:		9/4/2013 10:55:27 AM			
Query:		All Home				Executed on:		9/04/2013 11:55AM GMT-05:00			
Actual/Adjusted:		Show hours credited to this period only.				Printed for:		ctros999			
						Insert Page Break After Each Employee:		No			
Date/Time	Appl To	In Punch	In Exc	Out Punch	Out Exc	Override Amount	Adj/Ent Amount	Money Amount	Day Amount	Totaled Amount	Cum. Tot. Amount
<i>Xlf/Move: Account</i>		<i>Comment</i>		<i>Xlf: Work Rule</i>							
8/23/2013		7:30:00 AM		11:02:00 AM						3:30	43:30
8/23/2013		11:30:00 AM		3:58:00 PM						4:30	48:00
8/26/2013		7:30:00 AM		11:04:00 AM						3:30	51:30
8/26/2013		11:34:00 AM		3:59:00 PM						4:30	56:00
8/27/2013		7:29:00 AM		11:22:00 AM						3:45	59:45
8/27/2013		11:58:00 AM		4:02:00 PM						4:15	64:00
8/28/2013		8:00:00 AM		11:00:00 AM						3:00	67:00
			LV								
8/28/2013		11:30:00 AM								0:00	67:00
					MO						
8/29/2013		7:35:00 AM		11:22:00 AM						3:45	70:45
8/29/2013		11:45:00 AM		4:03:00 PM						4:15	75:00
Labor Account Summary				Pay Code		Hours		Money		Days	
010/119A/SBS001/901999/LL-				LV-All Worked		75:00					
				REGULAR		75:00					
				Total Leave and Reg Hours		75:00					
				Total Reg and Contract		75:00					
				Total Worked Time		75:00					
Combined Pay Code Summary				Pay Code		Hours		Money		Days	
				LV-All Worked		75:00					
				Total Leave and Reg Hours		75:00					
				Total Reg and Contract		75:00					
				Total Worked Time		75:00					
Totals:						300:00		\$0.00		0.00	

Page 7



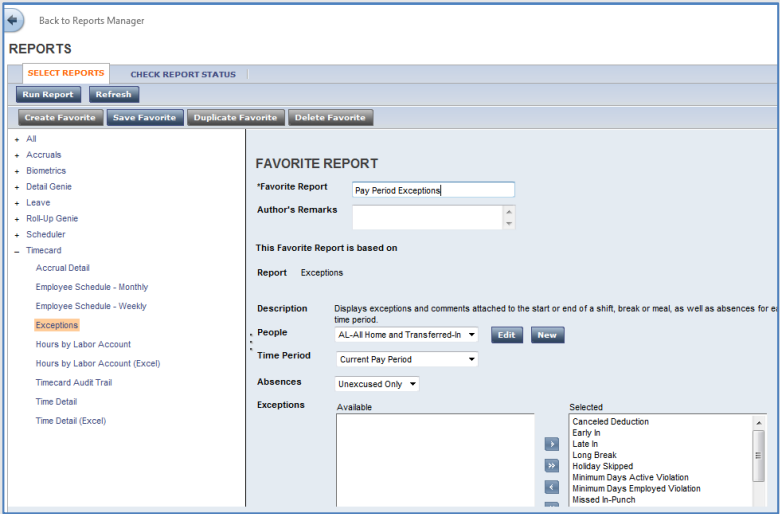
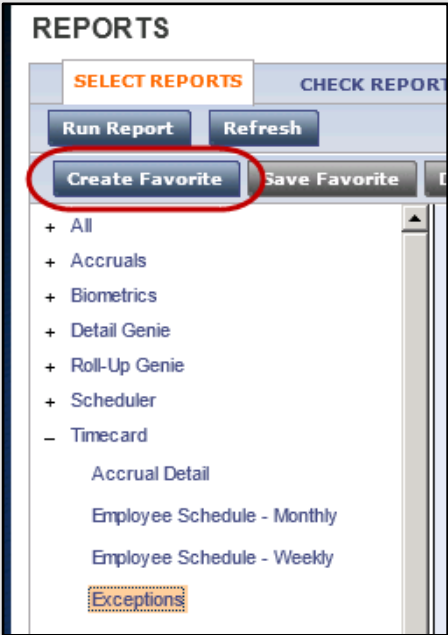
Setting Up Report Favorites

If you run the same report with the same options regularly, you can establish the report as a favorite. You can run the report as needed without having to reset your options. Favorites display as a new category at the top of the list.

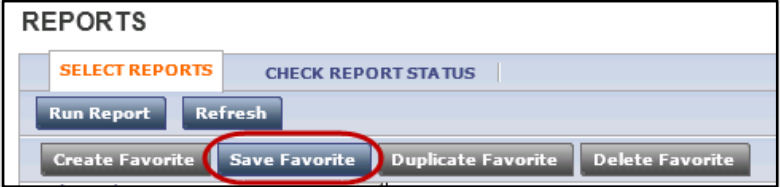

Exercise

You use the Exceptions report often and want to retain the criteria for regular use. So you decide to save this report as a favorite.

Steps	
1	Select the Exceptions report.
2	Click Create Favorite .
3	In the Favorite Report field, name the report Pay Period Exceptions .
4	In the Author's Remarks field, enter descriptive data (optional).
5	Select the options that you would like to see in the report. All options are in the Selected window. If only certain options are needed, move All selections to the Available window, then select the options that are desired. Hold down the CTRL key for each selection. Use the left and right arrows to move the selections to the Selected pane. Note: Options may vary by report.





Steps		
6	Click Save Favorite .	 <p>The screenshot shows the 'REPORTS' section of a software interface. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs are two buttons: 'Run Report' and 'Refresh'. At the bottom, there are four buttons: 'Create Favorite', 'Save Favorite' (circled in red), 'Duplicate Favorite', and 'Delete Favorite'.</p>
7	Confirm that the report is displayed in the Favorites category.	 <p>The screenshot shows the 'REPORTS' section of a software interface. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs are two buttons: 'Run Report' and 'Refresh'. At the bottom, there are three buttons: 'Create Favorite', 'Save Favorite', and 'Duplicate Favorite'. Below these buttons, there is a list of categories: '- Favorites' (circled in red), 'Pay Period Exceptions', and '+ All'.</p>



Working with Time Off Requests

Using the Manage My Requests Widget

Purpose

The Manage My Requests widget summarizes all requests in one window and provides all supporting information needed to process requests. Requests can come from employees or other managers, such as, manager delegation requests. In the Manage My Requests widget, managers can process requests one at a time or simultaneously process multiple requests of the same type. Managers can also filter the list of requests displayed in the widget and sort the list by column.

The screenshot shows the 'Manage My Requests' widget. Annotations include:

- Request Type:** Points to the 'Time-Off' dropdown menu.
- Request Status:** Points to the 'Submitted' dropdown menu.
- Request Tabs:** Points to the 'Accruals' and 'Details' tabs at the bottom.
- Request Actions:** Points to the 'Details', 'Edit', 'Approve', 'Refuse', 'Pending', 'Retract', and 'Request Time Off' buttons.

Submit Date	Status	Submitted By	Start Date	Employee	End Date	Pay Code	Comments
12/31/2013 8:00AM	Submitted	Exempt1, EdwardA	1/21/2014	Exempt1, EdwardA	1/21/2014	ANNUAL LEAVE T..	Notes

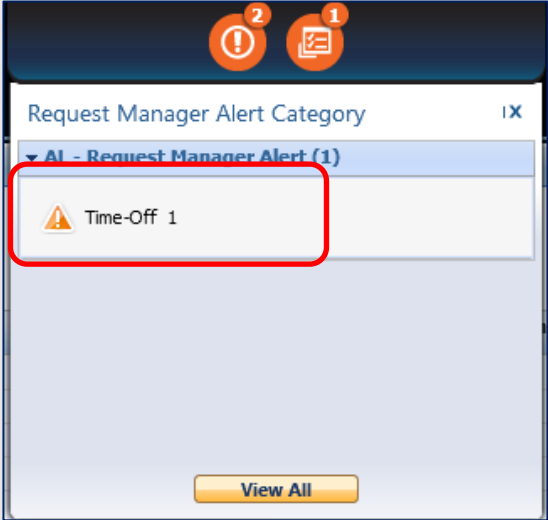
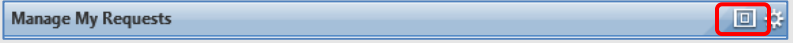

Type	Balance Range of Dates	Beginning Balance	Planned Usages	Pending Accruals	Ending Balance
EXCESS ANNUAL LEAVE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
ESCROW SICK LEAVE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
ANNUAL LEAVE	1/01/2014 - 12/31/2014	257:35	0:00	95:20	352:55
MILITARY - FED - TAK...	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00
SICK LEAVE	1/01/2014 - 12/31/2014	173:20	0:00	95:20	268:40
LWOP - TAKEN	1/01/2014 - 12/31/2014	-153:00	0:00	0:00	-153:00
EXCESS SICK LEAVE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00

Component	Description
Request type	This field enables managers to filter the requests that are listed based on the request type.
Request status	This field enables managers to filter the requests that are listed based on the request status.
Request tabs	These tabs display different information relevant to the selected request.
Request actions	These buttons enable managers to perform actions related to processing employee requests.



Exercise

Edward Exempt is requesting time off. You want to view his request and approve the request.

Steps		
1	To access the Manage My Requests widget, choose one of the following: <ul style="list-style-type: none">Select a request type in the Requests alert list.	
2	In the Manage My Requests widget, click the Maximize/Restore icon to expand the widget to its full size.	
3	Leave the default values or select new values in the Time Period and Show fields.	



4	<p>Confirm the default values, or select new values in the Request type and Request status fields.</p> <p>Note:</p> <ul style="list-style-type: none">The Request type field lets you select the type of requests you are viewing.The Request status button lets you limit which statuses display. For example, you may only want to view Submitted requests. <p>For this exercise, leave defaults.</p>	<div><div>Multiple</div><div>All Status Approved Cancel Approved Cancel Refused ✓ Cancel Submitted ✓ Draft ✓ Pending Refused Retracted ✓ Submitted Suspended</div></div> <div><div>Time-Off</div><div>Mgr_Delegation</div><div>Time-Off</div></div>										
5	Select a request to process. For this exercise, select Edward Exempt's request.											
6	<ul style="list-style-type: none">Select the Accruals tab to display the employee's accrual balances.Select the Details tab for more detail on the selected request.	<table><tr><th>Type</th><th>Balance Range</th></tr><tr><td>EXCESS ANNUAL LEAVE</td><td>1/01/2014 - 12/31/2014</td></tr><tr><td>ESCROW SICK LEAVE</td><td>1/01/2014 - 12/31/2014</td></tr><tr><td>ANNUAL LEAVE</td><td>1/01/2014 - 12/31/2014</td></tr><tr><td>MILITARY - FED - TAK...</td><td>1/01/2014 - 12/31/2014</td></tr></table> <div><div>Accruals</div><div>Details</div></div>	Type	Balance Range	EXCESS ANNUAL LEAVE	1/01/2014 - 12/31/2014	ESCROW SICK LEAVE	1/01/2014 - 12/31/2014	ANNUAL LEAVE	1/01/2014 - 12/31/2014	MILITARY - FED - TAK...	1/01/2014 - 12/31/2014
Type	Balance Range											
EXCESS ANNUAL LEAVE	1/01/2014 - 12/31/2014											
ESCROW SICK LEAVE	1/01/2014 - 12/31/2014											
ANNUAL LEAVE	1/01/2014 - 12/31/2014											
MILITARY - FED - TAK...	1/01/2014 - 12/31/2014											
7	To approve, refuse, or perform another action on the selected request(s), click the applicable button. For this exercise, select Approve .	<div><div>Details</div><div>Edit</div><div>Approve</div><div>Refuse</div><div>Pending</div><div>Retract</div></div>										
8	In the dialog box that displays, verify the information and, if applicable, select a comment from the Comments drop-down list and/or enter text in the Notes field. Also, verify requests for Hours were submitted in 15 minute increments.	<div><div>Approve Time-Off Request</div><div>Submitted 12/31/2013-8:00:00AM Modified by Exempt1, EdwardA Employee Exempt1, EdwardA</div><div>Requested</div><div><div>TypeTime Off Request</div><div>Pay codeANNUAL LEAVE TAKEN</div><div>Start date1/21/2014End date1/21/2014</div><div>DurationHours</div><div>Start time8:00AMLength2:00 h</div></div><div>Comments</div><div>Notes (Optional)</div><div>ApproveCancel</div></div>										
9	Click the Approve button.											
10	Click Refresh to update the Alert icon.	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div><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Editing Time Off Requests from the Schedule Editor

Purpose

Another method for approving a time off request is from **Related Items > Schedule Editor**. One benefit of using this option is you can view the schedules of your employees for that time period. You can make sure you have coverage during the time period.

Exercise

Edward decided he doesn't need this time off after all but he is off site today and the request needs to be cancelled. As his manager, you can cancel the request on his behalf.

Steps		
1	Go to Related Items > Schedule Editor . Select Resize button to maximize the widget.	
2	Change the Time Period to Range of Dates . Then select the date range that coincides with the time off request. (Edward's request is for Tuesday of the Next Pay Period) Note: Requests are retrieved below using this time period setting. It may be necessary to modify this selection to see particular requests.	
3	In the lower portion of the screen, select the Requests tab.	
4	Note: This portion of the screen can be resized by clicking the mouse on the three dots in the center and dragging them upward.	
5	From the Request For drop-down, select Time Off Requests . Leave the Status drop-down defaulted to All Status . Select Reload .	
6	The request previously approved for Edward Exempt displays.	



7	<p>Right-click on the row to display a menu of options.</p> <p>In the lower portion of the menu are items that may be selected to change the status of the request.</p> <p>Note: Options will vary based on the current status of the request.</p>	
8	<p>Choose Edit Request to display further information about the request. The status of the request may be changed from this window.</p>	
9	<p>Choose Cancel Submitted from the Status drop-down. Then click OK.</p> <p>Click on the Save button.</p> <p>Note: The employee may also request the cancellation.</p>	
10	<p>Highlight the row again. Status is now Cancel Submitted.</p> <p>Right-click on the row to display the menu. Select Cancel Approved.</p> <p>The message box displays. Select Yes.</p>	
11	<p>Notice Edward's schedule. It shows two schedules.</p> <p>The original schedule was restored, but the modified schedule was not removed.</p>	
12	<p>Click in the cell with the double schedule. Delete the incorrect schedule.</p> <p>Save the Schedule Editor page.</p>	
13	<p>Close the Schedule Editor tab.</p>	



Performing Additional Manager Tasks

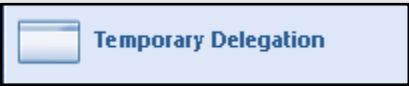
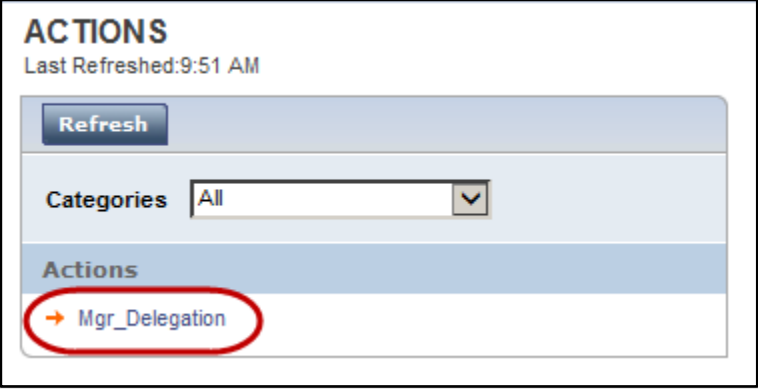
Requesting Backup Coverage

Purpose

You can temporarily delegate your manager tasks in eSTART to another manager. The other manager can perform your tasks using their own user names and passwords. For example, they can modify schedule shifts for absent employees, or review, edit and approve timecards. This allows the business process to keep moving even when you are not there. All edits they perform are recorded and assigned to their names for audit purposes.

Exercise

You are out of the office for two days. You send a delegation request to **Junior Manager** so that you can temporarily assign your timekeeping tasks to him. This will ensure that your employees' timecards are processed for payroll on a timely basis.

Steps		
1	From the Related Items pane, select Temporary Delegation .	
2	From the list of actions, select Mgr_Delegation .	
3	The Create Delegation window opens. Note: If another delegation assignment exists, click Create New Delegation .	



Steps

4	From the Delegate drop-down list, select Junior Manager .	<div><div>Existing Delegations</div><div>None</div><div>New Delegation</div><div><div>* Delegate: Manager1, JuniorA</div><div>* Start Date: 1/17/2014</div><div>* End Date: 1/18/2014</div><div>* Role: Manager Role</div><div>Save & Close</div><div>Cancel</div></div></div>
5	Select today's date from the Start Date field and tomorrow's date from the End Date field.	
6	From Manager from the Role drop-down list.	
7	Click Save & Close . The application sends the delegation request to the other manager's Inbox.	



Accepting or Declining Backup Coverage Requests

Purpose

When another manager sends you a request to cover his or her timekeeping and scheduling tasks, the application automatically places a task in your Inbox. The delegation request specifies the start and end dates and the role you will assume. You can access the request to accept or decline from the My Inbox widget.



Note

An indicator for delegation will also display from the Requests icon. The method described above in the Working with Time Off Requests section can be used to approve these requests as well.

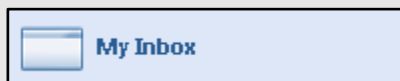
Exercise

For this exercise, log off as **Johnx.Manager#**. Log on as **Juniorx.Manager#**.

John Manager is going to be away attending a conference next week. He sent you a delegation request that you will review and accept.

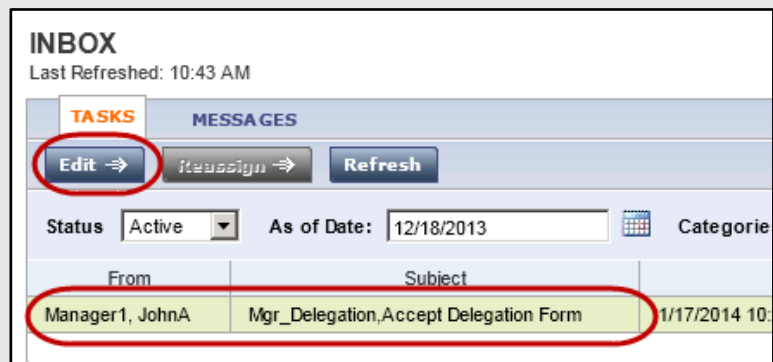
Steps

- 1 From the **Related Items** pane, select **My Inbox**.



- 2 From the **Tasks** tab, select the delegation request and click **Edit**.

Note: You can also double-click the request to view the request details.





Steps

3 To accept the request, confirm that the **Accept Delegation** button is selected.

4 (Optional) Enter a message to the requesting manager in the **Comment** field.

5 Click **Save & Close**.

Note: eSTART automatically sends a message to the delegator to confirm that you have accepted or declined the delegation request.

New Delegation

Delegator: Manager1, JohnA

Start Date: 1/17/2014

End Date: 1/18/2014

Role: Manager Role

Action

Select Action ☒ Accept Delegation
☐ Decline Delegation

Comment:

Save & Close

Cancel





Switching to Delegated Roles

Purpose

After you accept a delegation request, the application automatically provides access to the tasks defined in the role profile on the specified start date. A Switch Role link displays as a quick link so that you do not have to log on as the manager who delegated the tasks to you. The link identifies which role you currently are working.

Exercise

John Manager delegated his tasks to you (**Junior Manager**) this week and you are ready to perform his timekeeping tasks. You do not need to log off as yourself and log on as the other manager because you can switch roles while logged on with your own user name and password.

Steps		
1	<p>Click the Delegate Authority icon found just to the left of your username at the top of the Navigator window.</p> <p>Note: If you do not see the Switch Role link, log off and then log on again using your own user name and password.</p>	
2	Click to select the manager whose tasks you will perform as his or her delegate.	
3	The username at the top of the Navigator now displays your name and the name of the person whose role you have assumed.	



Note

You can perform any management functions that are delegated to you for the delegating manager..



Cancelling Delegations

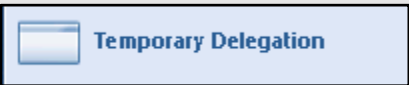
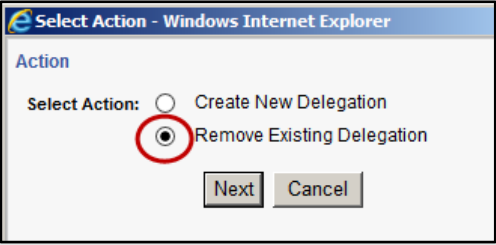
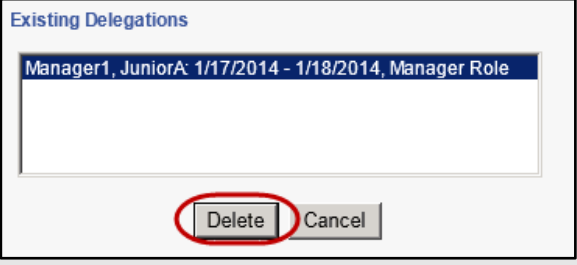
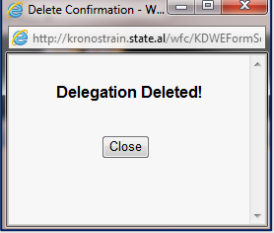
Purpose

The delegation rights are automatically removed on the end date. However, you can end the delegation earlier if you wish.

Exercise

For this exercise, log off as **Juniorx.Manager#** and log back in as **Johnx.Manager#**.

You (**John**) had delegated your management tasks to **Junior Manager** for two days. However, you returned the next day, so you will cancel the delegation.

Steps		
1	From the Related Items pane, select Temporary Delegation .	
2	From the list of actions, select Mgr_Delegation .	
3	Click Remove Existing Delegation .	
4	Click Next .	
5	Select the existing manager delegation that you want to cancel and click Delete .	
6	<p>The Delete Confirmation message displays.</p> <p>Junior will no longer have the option to switch role.</p> <p>He will receive an email message about the cancellation.</p>	



Finalizing Timecards

Reviewing Time Data at the End of the Pay Period

Purpose

As you have already seen, the **Reconcile Timecard** widget helps you to identify timecard discrepancies at the end of a pay period so that you can perform final edits. You must correct all exceptions before time data is signed off by Administrators. Otherwise, employees may not get paid correctly for that pay period.

RECONCILE TIMECARD VIEW

Last Refreshed: 1:28PM

Show

AL-All Home and Transf...

Edit

Time Period

Previous Pay Period

Refresh

Actions

Punch

Amount

Schedule

Leave

Name	1/	Unexcused Absence	Missed Punch	Early In	Late In	Early Out	Late Out	Unsched Hours	Holiday Skipped	Totals Up To Date
Exempt1, EdwardA										✓
Manager1, JuniorA			✓	✓						✓
Newby1, NeilA										✓
Punch1, PennyA			✓				✓		✓	✓
Stamp1, SandyA								✓		✓

The **Employee Hours View** widget is useful for verifying that your employees have the correct number of hours for the pay period. It also shows employees with compensatory time and overtime.

EMPLOYEE HOURS VIEW

Last Refreshed: 1:29PM

Show

AL-All Home and Transf...

Edit

Time Period

Previous Pay Period

Refresh

Actions

Punch

Amount

Schedule

Leave

Person Name	1/	Person ID	Pay Rule	Regular Hours	Non Worked Hours	Reg & Non Worked	OT 1.5	OT 1.0	Comp 1.5	Comp 1.0	Total Hours
Exempt1, EdwardA		10101	ESMARS-EXEMB-EXEMP-UNCLA 60A	72:00	8:00	80:00					80:00
Manager1, JuniorA		10301	SMARS COMP 60P	65:00	8:00	73:00					73:00
Newby1, NeilA		10501	Needs Update								
Punch1, PennyA		10201	SMARS COMP 60P	70:30		70:30					70:30
Stamp1, SandyA		10401	SMARS COMP 60P	70:00	8:00	78:00					78:00

The **Pay Period Close** widget is also useful for making a final review of your employee time records and also displays indicators for employee and manager approvals. You can access employee timecards from either widget to make final corrections and approve employee timecards.

PAY PERIOD CLOSE VIEW							
Last Refreshed: 1:40PM		Show	AL-All Home and Transf...	Edit	Time Period	Previous Pay Period	Refresh
Actions	Punch	Amount	Schedule	Leave			
Name	1/	Employee Approval	Manager Approval	Signed Off	Missed Punch	Unexcused Absence	Assigned Manager
Exempt1, EdwardA							Manager1, JohnA
Manager1, JuniorA		✓	1			✓	Manager1, JohnA
Newby1, NeilA							Manager1, JohnA
Punch1, PennyA					✓		Manager1, JohnA
Stamp1, SandyA		✓	2				Manager1, JuniorA



Note

A reminder to approve timecards will be sent to all employees' inbox the day after the end of the pay period. Users who have an Outlook email account will also receive these messages in their Outlook mailboxes.



Approving Timecards

Purpose

After you finish editing your employees' timecards, you need to approve them to indicate to Payroll that they are ready for processing. After you approve a timecard, the employee cannot make any edits unless you remove your approval.

Exercise

You have reviewed and performed all necessary edits to your employees' timecards. You now approve the timecards for the previous pay period on each timecard. **Note: As a rule, your non-exempt and hourly employees should have approved their own timecards before you approve them. For purposes of this exercise, employee approval has not been completed.**

Steps

- 1 From the **Related Items** pane, select **Reconcile Timecard**.

Related Items > Pay Period Close is another option for selecting your employees.

Note: Pay Period Close may still be open from the previous exercise.



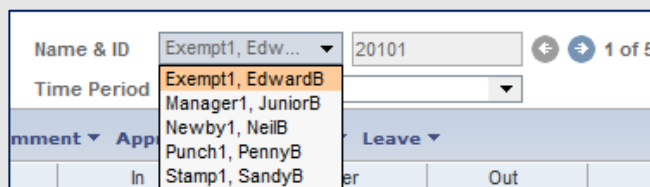
- 2 From the **Show** drop-down list, select **All Home and Transferred-In**.

From the **Time Period** drop-down list, select **Previous Pay Period**.

- 3 Select all the employees in the list, right-click and select **Timecard**.

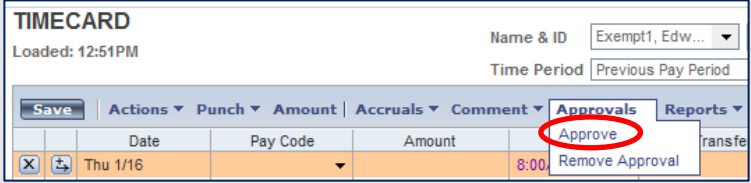
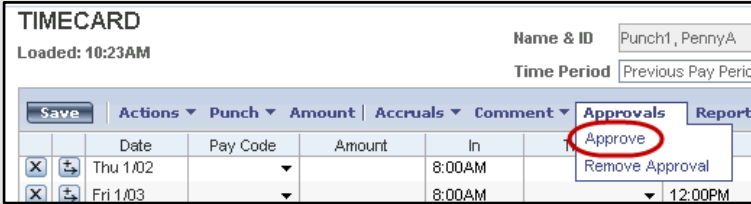

Name	Employee	Manager	Signed Off	Unexcused Absence	Leave Without Pay	Assigned Manager
Exempt1, EdwardB	✓	1		✓		Manager1, JohnA
Manager1, JuniorB						Manager1, JohnA
Newby1, NeilB						Manager1, JohnA
Punch1, PennyB						Manager1, JohnA
Stamp1, SandyB	✓	2				Manager1, JuniorA

- 4 The timecard of the first person in the list displays, but all are in the **Name & ID** drop-down. There is also a scroll bar to the right that can be used to move between the employees' timecards.
 - Review outstanding exceptions
 - Confirm total number of hours
 - Address any other changes needed





eSTART Managing Timecards and Schedules Course Guide for Managers

5	On the first employee, select Approvals > Approve .	
6	Scroll to the next employee in the list and choose Approvals > Approve . Note: Any exceptions on the timecard must be addressed before approving.	
7	To confirm the approval status on a timecard, click the Sign-offs, Requests & Approvals tab and review the Timecard Approval by Manager information.	
8	Close the My Views tab.	



Best Business Practice

Each non-exempt or hourly employee must approve his or her timecard. This helps to ensure its accuracy before manager approval is applied.



Creating Ad Hoc and Personal HyperFind Queries

Purpose

eSTART uses HyperFind queries to search and return employees who meet a specific set of criteria. You can use HyperFind queries in eSTART widgets and reports. All the options in the Show drop-down list are HyperFind queries. If an existing HyperFind query does not return the correct set of employees, you can create your own Ad Hoc query. Ad Hoc queries are temporary and are available only during your current session. Once you log off, Ad Hoc queries are no longer available.

Another option is to create a Personal query. Personal queries are available only to you and remain available until you remove them. However, you may share them with others.

Exercise

You want a quick way to access all employees with Comp Time hours. Create a Personal HyperFind query to see all employees that meet these criteria.

Steps

1 From a widget, such as **Reconcile Timecard**, select one of the following from the **Show** drop-down list:

- **Edit Ad Hoc** to modify the Ad Hoc query for this session only.
- **New** to create a new personal query for reuse.

For this exercise, select **New**.

Note: This function may also be accessed from **Related Items > Setup > HyperFind Queries**.

Time Period	Early In	Out	Unscheduled Hours



Steps	
2	<p>Select a filter from one of the filter categories.</p> <p>For this exercise, select Time Management > Pay Code.</p>
3	<p>Radio buttons are available to choose Include or Exclude people who meet this condition.</p> <p>Leave Include selected.</p>
4	<p>Worked drop-down defaults to More Than. Leave this selected.</p> <p>Key 0.00 in the Amount field.</p>
5	<p>Locate the Comp Time Pay Codes from the list, highlight Comp Time Earned 1.0.</p>
6	<p>Click Add Condition.</p>
7	<p>Repeat steps 5 through 6 to add Comp Time Earned 1.5.</p>
8	<p>Click the Test button to review the sample query results. If no immediate results, choose Previous Pay Period.</p> <p>Click the X in the upper right-hand corner of the test window to close the dialog box.</p> <p>If you do not receive the results you expected, edit your conditions.</p>
9	<p>Click Save or Save As.</p>

Filters

- ☒ General Information
- ☒ Timekeeper
- ☒ Time Management
 - Jobs
 - Accounts
 - Pay Code**
 - Exceptions
 - Comments
 - Reviewed Exception

Pay Code

☒ Include ☐ Exclude people who meet this condition.

Worked (Hours)

Amount (Hours)

In

- Total Hours
- ADDITIONAL HOURS
- ANNUAL LEAVE TAKEN
- BLOOD DONATION
- COMP OVERAGE PAYOUT
- COMP TIME EARNED 1.0
- COMP TIME EARNED 1.5**
- COMP TIME TAKEN
- CONTRACT EMPLOYEE
- EXCESS ANNUAL LEAVE

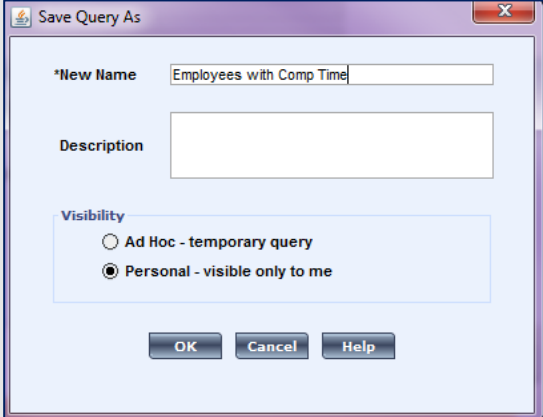
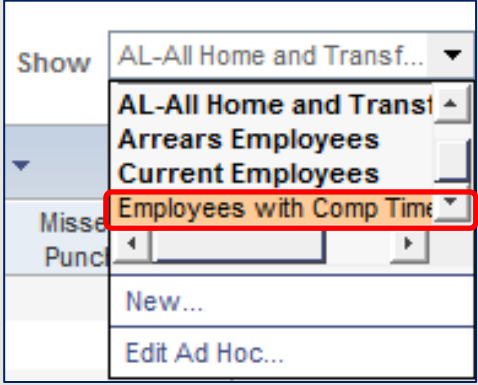
Add Condition

Selected Conditions

- COMP TIME EARNED 1.0 hours worked is more than 0:00
- COMP TIME EARNED 1.5 hours worked is more than 0:00



Steps

<p>10 What type of query do you want to create?</p> <ul style="list-style-type: none"> • Select the Ad Hoc – temporary query option to use this query only during your current session. • Select the Personal – visible only to me option if you want to be able to use the query on an ongoing basis. <p>For this exercise, select Personal-visible only to me.</p>	 <p>The 'Save Query As' dialog box is shown. The 'New Name' field contains 'Employees with Comp Time'. The 'Description' field is empty. Under the 'Visibility' section, the 'Personal - visible only to me' radio button is selected. The 'Ad Hoc - temporary query' radio button is unselected. There are 'OK', 'Cancel', and 'Help' buttons at the bottom.</p>
<p>11 If you selected Personal, enter a query name and a description.</p>	
<p>12 Click OK.</p>	
<p>13 If you created a Personal query, you will be able to view it in the Show list.</p> <p>Return to Related Items > Reconcile Timecard to view your query.</p> <p>Select Previous Pay Period from the Time Period.</p> <p>Tip: Personal queries display in regular text (not bold).</p>	 <p>The 'Show' list dropdown menu is open. The list contains: 'AL-All Home and Transf...', 'AL-All Home and Transf...', 'Arrears Employees', 'Current Employees', 'Employees with Comp Time' (highlighted with a red box), 'New...', and 'Edit Ad Hoc...'. The 'Employees with Comp Time' item is the newly created query.</p>
<p>14 Close Reconcile Timecard tab.</p>	



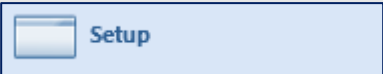
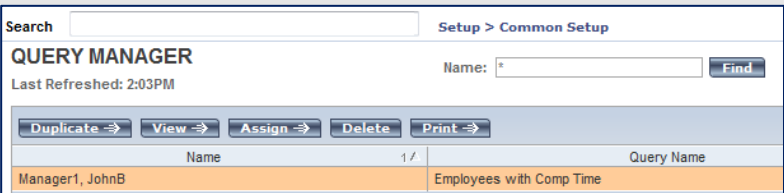
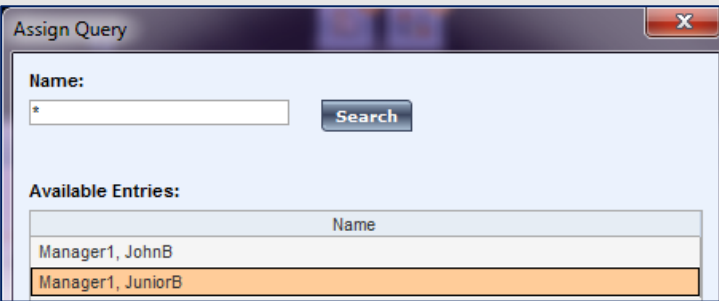
Assigning a Personal HyperFind Query to Another Person

Purpose

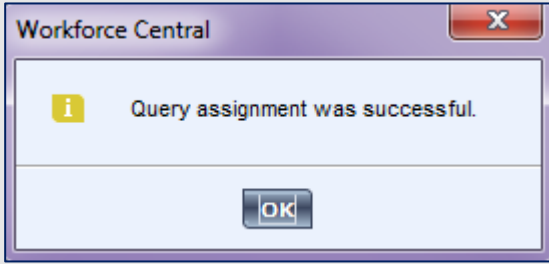
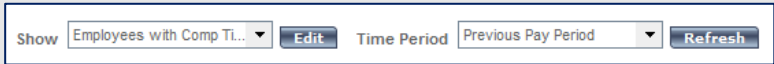
A personal HyperFind query may ordinarily only be used by the person who created it. However, you may share it with another person or persons to whom it might be helpful.

Exercise

You created the HyperFind query above to assist with monitoring Comp Time. You feel this query would be helpful to other managers and wish to share it.

Steps		
1	From the Related Items pane, select Setup . Then, select Query Manager	
2	Select Find to retrieve a list of existing queries.	
3	Highlight the query to be assigned. Click the Assign button.	
4	The Assign Query window displays with a list of available names. A Search field is available to narrow the search, if needed. Select Junior Manager .	



Steps		
5	<p>Message displays to indicate whether assignment was successful.</p> <p>Select the OK button.</p> <p>Note: Only one name may be selected. Repeat steps to add others, if needed.</p>	
6	<p>The assigned person now has access to the query from any of their Show drop-downs.</p>	
7	<p>Close Setup tab.</p>	



Using the Employee Workspace

Sometimes you will need to access your own employee records. For example, you will need to submit your own requests for time off as an employee. To access your time and calendar data, you have access to a workspace called the Employee Workspace. You have fewer rights when accessing your own information than when accessing your employee's records.

Accessing the Employee Workspace

Steps	
1	Click the Workspaces tab.
2	Click the Employee Workspace option.



From this workspace, you have access to:

- My Timecard
- My Timestamp
- My Accruals
- My Calendar
- Change Password
- My Extended Leave Requests
- My Inbox
- My Reports
- My Time Off Requests



Primary and Secondary Widgets

The Employee Workspace includes its own Related Items pane as well as four default widgets. These widgets can be in a primary position or secondary position. In most cases, you can only work in the primary widget.

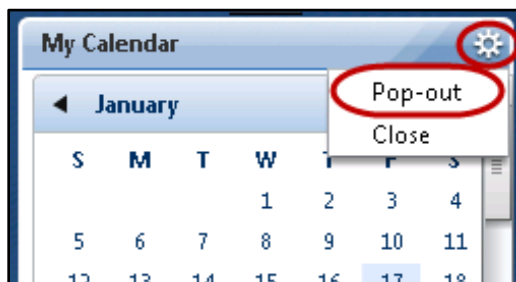
The screenshot displays the eSTART Employee Workspace interface. The top navigation bar includes the eSTART-Train logo, user information (John A. Manager1), and a Sign Out button. The main area is divided into a Primary Widget and a Related Items pane. The Primary Widget contains a 'My Timecard' table with columns for Date, Pay Code, Amount, In, Transfer, Out, Shift, Daily, and Period. Below the table is a 'My Totals' section. The Related Items pane on the right contains three widgets: 'My Timestamp' with a 'Record Timestamp' button, 'My Accruals' showing 'ANNUAL LEAVE' and 'BEREAVEMENT OWED', and 'My Calendar' for June 2014. A 'Workspaces' dropdown menu is located at the top right. Red arrows point to the gear icons in the upper-right corner of the 'My Timecard' and 'My Accruals' widgets, and to the 'Related Items pane' label.

Date	Pay Code	Amount	In	Transfer	Out	Shift	Daily	Period
Mon 6/16			8:00AM		5:00PM	8:00	8:00	8:00
Tue 6/17			8:00AM		5:00PM	8:00	8:00	16:00
Wed 6/18			8:00AM		5:00PM	8:00	8:00	24:00
Thu 6/19			8:00AM		5:00PM	8:00	8:00	32:00
Fri 6/20			8:00AM		5:00PM	8:00	8:00	40:00
Sat 6/21								40:00

Account	Pay Code	Amount
001/0000/100010/-/-/-	REGULAR	88:00

June 2014						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21

You can make a secondary widget the primary widget by clicking the gear icon in the upper-right corner of a widget and selecting **Pop-out**. The current primary widget will shift into a secondary widget position. Other available widgets can be accessed from the Related Items pane.





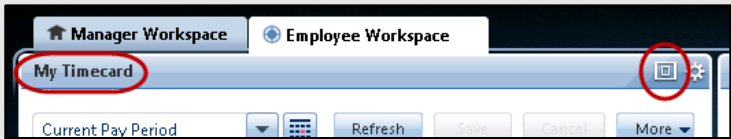
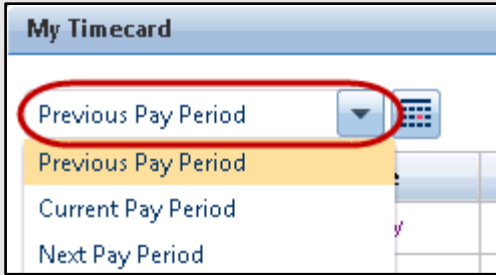

Reviewing and Approving your Time using My Timecard

Purpose

When you need to review your own timecard, you will access it from the Employee Workspace. You will also use the My Timecard widget to approve your own time for the pay period. Currently, at the end of each pay period, you have to sign your timecard signifying that the times entered are true and correct. With eSTART, you electronically sign your timecard by simply “Approving” the electronic document.

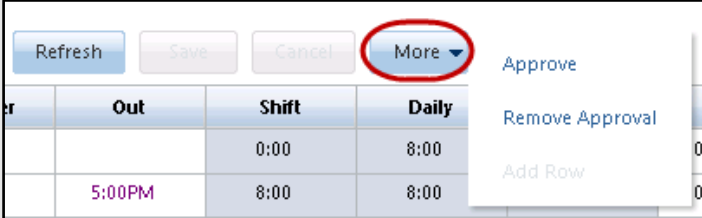
Exercise


You want to review your timecard and approve it for the pay period.

Steps		
1	In the Employee Workspace, verify that My Timecard is the primary widget. If not, click the gear icon on the My Timecard widget and select Pop-out .	
2	Click the Resize button to maximize the My Timecard widget. Note: Use the same button to return the widget to its default size.	
3	Select the Previous Pay Period to review.	
4	Review your timecard. Note: You do not have rights to edit your own punches.	Blue = Excused Absence Red = Exception (see manager before approving) Green = Manager has marked as reviewed Comment icon = Manager has added a comment Purple = Populated by eSTART
5	Review the Totals Detail section of the timecard which contains the breakdown of your worked and non-worked time.	



Steps

6	To approve your timecard for the selected time period, click the More button and select Approve .	
---	---	--

7	Timecard is Approved displays above the Time Period drop-down.	
---	---	--

8	Select Resize to return the timecard to its original size.	
---	---	--



Note

A reminder to approve timecards will be sent to the employee's inbox the day after the end of the pay period. Users who have an Outlook email account will also receive these messages in their Outlook mailboxes.



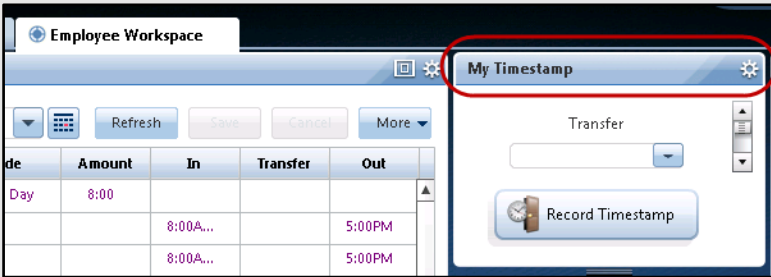
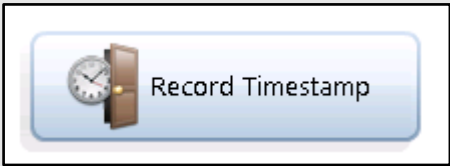
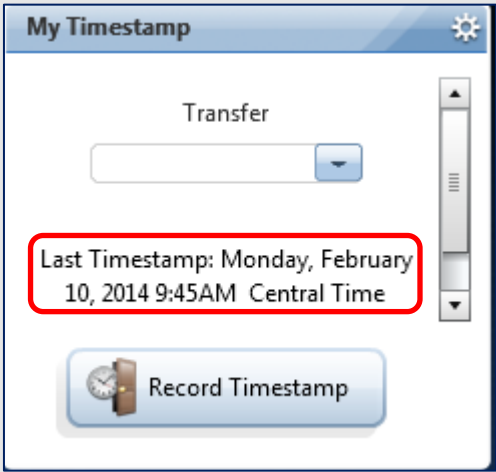
Using My Timestamp

Purpose

If you are an employee who is required to punch from your workstation, you will use the My Timestamp widget to record your punches during your shift.

Exercise

You want to record a punch for the start of your shift in the Employee Workspace.

Steps		
1	<p>Select Current Pay Period.</p> <p>Locate the My Timestamp widget in the Employee Workspace.</p>	 <p>The screenshot shows the 'Employee Workspace' interface. On the right side, there is a widget titled 'My Timestamp' which is circled in red. The widget includes a 'Transfer' dropdown menu and a 'Record Timestamp' button. In the background, a table is visible with columns: 'Date', 'Amount', 'In', 'Transfer', and 'Out'. The 'Amount' column shows '8:00'. The 'In' column shows '8:00A...'. The 'Out' column shows '5:00PM'.</p>
2	<p>Click the Record Timestamp button.</p>	 <p>A close-up of the 'Record Timestamp' button, which features a clock icon and the text 'Record Timestamp'.</p>
3	<p>Note: The date and time of the last recorded timestamp displays on the My Timestamp widget.</p>	 <p>The screenshot shows the 'My Timestamp' widget. It includes a 'Transfer' dropdown menu and a 'Record Timestamp' button. A red box highlights the text 'Last Timestamp: Monday, February 10, 2014 9:45AM Central Time'.</p>



Using My Accruals

Purpose

As an employee, you can review your own leave accrual balances from the Employee Workspace.

Exercise

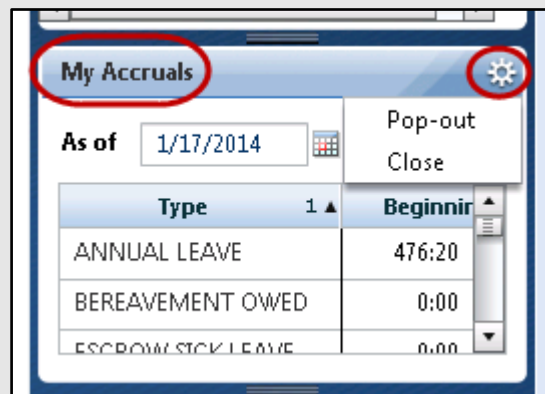
You want to review your own leave balances from the Employee Workspace.

Steps

1 Locate the **My Accruals** widget in the Employee Workspace.

2 Click the gear icon on the **My Accruals** widget and select **Pop-out**.

Note: Another option is to click on the widget and drag it to the main workspace.



3 The **My Accruals** widget displays:
Type: The type of accrual balance, such as Annual Leave or Sick Leave.

Balance Range of Dates: The leave reporting period (current year).

Beginning Balance: The accrual balance from the payroll system as of the date in the **As of** drop-down.

Planned Usages: The total amount of time scheduled to be taken, from the **As of** date through the end of the Reporting Period (12/31).

Pending Accruals: The total accruals projected from the **As of** date through the end of the Reporting Period (12/31).

Ending Balance: The total accruals projected from the **As of** date through the end of the Reporting Period (12/31).

My Accruals						
As of 1/17/2014						
Accrual Profile: AL - EXEMPT BENEFIT ELIGIBLE						
Type	Balance Range of Dates	Beginning Balance	Planned Usages	Pending Accruals	Ending Balance	
ANNUAL LEAVE	1/01/2014 - 12/31/2014	476:20	0:00	95:20	480:00	
BEREAVEMENT OWED	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00	
ESCROW SICK LEAVE	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00	
EXCESS ANNUAL LEAVE	1/01/2014 - 12/31/2014	52:45	0:00	91:40	144:25	
EXCESS SICK LEAVE	1/01/2014 - 12/31/2014	92:25	0:00	95:20	187:45	
HOLIDAY BANKED	1/01/2014 - 12/31/2014	0:00	16:00	16:00	0:00	
HOLIDAY OVER 1 YEAR	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00	
LWOP - TAKEN	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00	
MILITARY - FED - TAK...	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00	
PERSONAL DAY	1/01/2014 - 12/31/2014	0:00	0:00	0:00	0:00	
SICK LEAVE	1/01/2014 - 12/31/2014	1200:00	0:00	95:20	1200:00	



Viewing My Calendar

Purpose

The My Calendar widget is used to view your schedule information and to view and request time off. You can hover over a shift to view more detailed information. You can also change the view size and use the filter at the top to show and hide particular item types in the calendar.

The following illustration shows a week wide view.

Sun 6/22	Mon 6/23	Tue 6/24	Wed 6/25	Thu 6/26	Fri 6/27	Sat 6/28
		Time Off Request		Time Off Request	Time Off Request	
	<div>0730am - 0400p... 7:30AM-4:00PM [8:30 h] Regular</div>	<div>ANNUAL LEAVE ... 7:30AM [8:00 h]</div>	<div>ANNUAL LEAVE ... 7:30AM [8:00 h]</div>	<div>0730am - 0400p... 7:30AM-4:00PM [8:30 h] Regular</div>	<div>0730am - 0400p... 7:30AM-4:00PM [8:30 h] Regular</div>	

Navigating in a calendar

The following table describes the actions that display information in a calendar for data analysis:

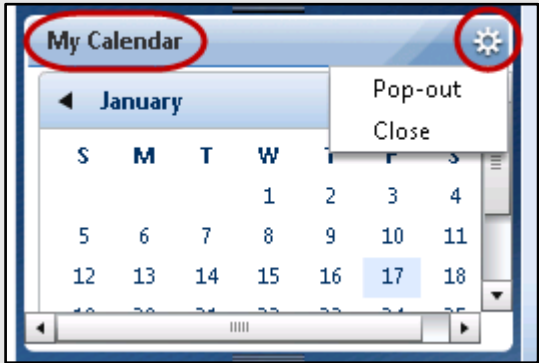
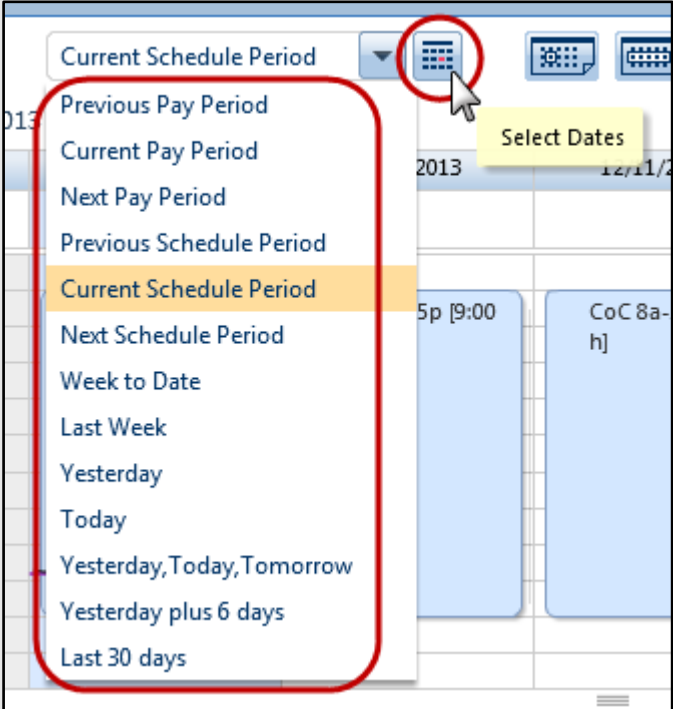

Action	Step
To view details of a particular day	Place your cursor over a shift to view details, such as the labor account the hours are assigned to for the shift.
To view different calendar formats	Select to view one day across the screen. Select to view one week across the screen. Select to view one month across the screen.
To view certain elements in your calendar	Select to display elements such as, time off requests, holidays, scheduled pay codes, or scheduled shifts. Uncheck an item to remove it from the display.



Exercise

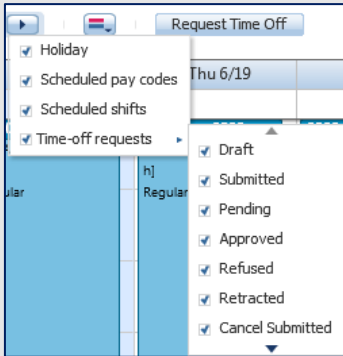
You want to review your own calendar for the current week. Access My Calendar and use the tools to look at your calendar in different formats.

Steps

1	Locate the My Calendar widget in the Employee Workspace widget. Note: This widget may still be open from the previous exercise.	
2	Click the gear icon on the My Calendar widget and select Pop-out .	
3	From the Time Period drop-down, select Current Schedule Period .	
4	You can also adjust the width of the calendar view.	








Steps

5	Click the Filter icon to select the elements you want to view in your calendar. Uncheck an item to remove it from the display.	
6	Review information in the calendar workspace.	
7	Return calendar to By Week view.	

Request Symbols

The symbols below will display on the request in the calendar, indicating the status of the request.

	Submitted - for approval or cancellation
	Retracted - prior to manager approval
	Approved - for taking or for cancellation
	Pending
	Refused



Requesting Time Off

Purpose

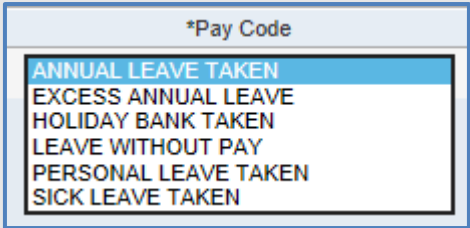
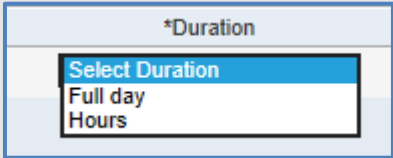
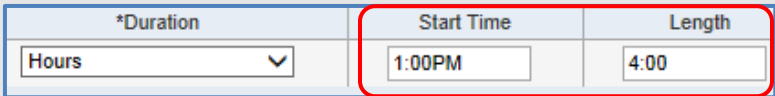

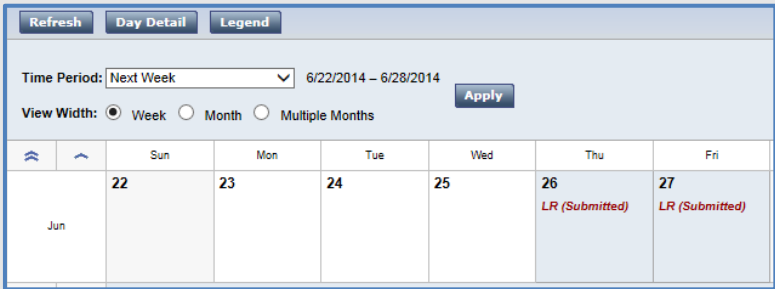
The Request Time Off screen displays a calendar to provide a consistent, easily accessible way to request or cancel time off. eSTART forwards the request to your manager to handle appropriately.

Exercise

Your childcare provider will be unavailable next Thursday and Friday and you need to take the afternoons off. Submit a time-off request for four hours of Annual Leave each day starting at 1 p.m. for next Thursday and Friday.

Steps	
1	From Related Items , select My Time Off Requests .
2	In the calendar that displays, select Next Week from the Time Period drop-down. Then click the Apply button.
3	In the calendar, click on Thursday and Friday . The dates should become highlighted in light green.
4	Select Time Off Request from the lower left menu. Note: The My Current Requests selection may be used to view existing requests.
5	The dates selected in the calendar should be populated in the Start Date and End Date fields, but can be changed if needed.



Steps		
6	Select the Pay Code from the drop-down list.	
7	<p>Select a Duration type.</p> <p>If you select Full Day, your scheduled hours will be used to determine the amount of time charged for each day.</p> <p>If you select Hours, you must specify a Start time and Length for the leave time to be used for each requested day.</p> <p>Note: Requests for Hours must be submitted in <u>15 minute increments</u>.</p> <p>For this exercise, select Hours.</p>	
8	<p>Enter the Start time of 1p (always use am/pm) for the leave and 4 in the Length field.</p> <p>Note: The Length field contains the <u>number of hours</u> being requested.</p>	
9	(Optional) Enter Notes for the request.	
10	Click Submit .	
11	<p>The request has been submitted for approval and displays in the employee's calendar with the Submitted status.</p> <p>Note: Once the requested time is approved by your manager, the schedule will automatically be updated to show the scheduled leave time for the requested days.</p>	



Best Business Practice

All requests for time off, including doctor visits (sick leave), should be submitted through the time clock or eSTART application.

Submit multiple requests whenever time off requests span across weekends to prevent the request from displaying in the timecard with zero hours for those days. A request that spans a holiday will result in the leave being charged on that day, which would require cancelling and resubmitting the request.



Tip

The **Request Time Off** selection within the **My Calendar** widget may also be used to request time off.



Annual Leave Cascade

A cascade defines how leave time is processed in the system. If Annual Leave is selected in eSTART, leave will be used, based on the time of the year, in the order as described in the chart below:

Annual Leave Cascade	
January 1 – July 31	August 1 – December 31
Comp Time	Personal Day
Excess Annual	Excess Annual
Annual	Comp Time
	Annual



Note

The following are not impacted by the cascade:

- Follow your agency's policy and procedures regarding the usage of personal leave days before August 1st.
- Your holiday banked time may be scheduled by your supervisor in the quarter in which it was earned.

If the cascade makes a change to the type of leave originally submitted, the timecard will display the information as indicated below. The changes made by the cascade will be shaded in gray. There will be a Historical Edits tab on the lower portion of the page. This tab will display the changes that were made by the cascade.

In this example, the original request was for two hours of annual leave in May. Since the employee had one hour of Comp Time and also had Excess Annual Leave time, the cascade reversed the original request for annual leave, used the Comp Time first, then the Excess Annual Leave.

Save Actions Punch Amount Accruals Comment Approvals Overtime Reports Leave											
Date	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Cumu
Thu 5/08			7:58AM		4:00PM				8:00	8:00	48:00
Fri 5/09			7:58AM		1:00PM	1:30PM		4:30PM	8:00	8:00	56:00
Sat 5/10											56:00
Sun 5/11											56:00
Mon 5/12			7:55AM		1:00PM	1:30PM		4:30PM	8:00	8:00	64:00
Tue 5/13			7:59AM		12:01PM	12:31PM		4:30PM	8:00	8:00	72:00
Wed 5/14	ANNUAL LEAVE TAKEN	-2:00									
Wed 5/14	COMP TIME TAKEN	1:00									
Wed 5/14	EXCESS ANNUAL LEAVE	1:00									
Wed 5/14			8:05AM		2:03PM				6:00		
Wed 5/14	ANNUAL LEAVE TAKEN	2:00	2:00PM							8:00	80:00
Thu 5/15			8:00AM		10:00AM				2:00		
TOTALS & SCHEDULE LEAVE REPORTING PERIOD VIEW AUDITS COMMENTS SIGN-OFFS, REQUESTS & APPROVALS HISTORICAL AMOUNTS											
Effective Date	Historical Date	Type of Edit	From Account	To Account	From Pay Code	To Pay Code	Amount	Comments	Note		
5/21/2014	5/14/2014	Historical Pay Code Edit				COMP TIME TAKEN	1:00 (paid)	Cascade Change			
5/21/2014	5/14/2014	Historical Pay Code Edit				ANNUAL LEAVE T...	-2:00 (paid)	Cascade Change			
5/21/2014	5/14/2014	Historical Pay Code Edit				EXCESS ANNUAL L...	1:00 (paid)	Cascade Change			

The Comments tab will also display a comment to indicate the change was made by the cascade.

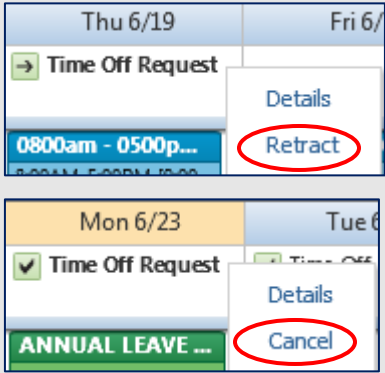
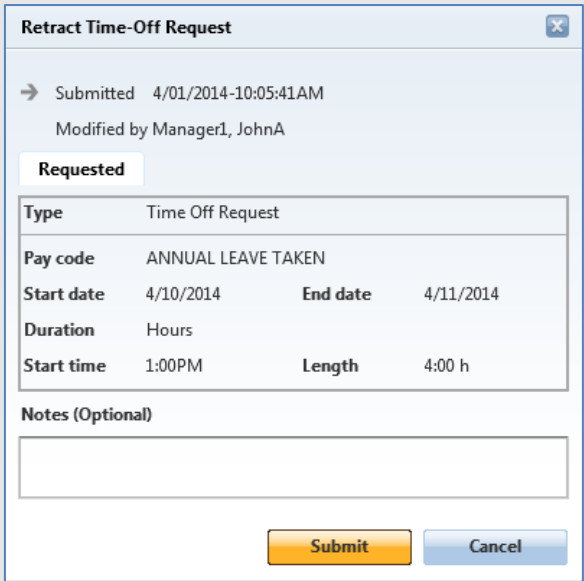
Wed 5/14	Cascade Change
Wed 5/14	Cascade Change
Wed 5/14	Cascade Change



Cancelling a Time Off Request

If your need for time off changes, you may cancel or retract a request.

Steps

1	Access the My Calendar widget.	
2	Left click the Time Off Request in the calendar. <ul style="list-style-type: none">If the request has NOT been approved by your manager, select Retract.If it HAS been approved, select Cancel. Note: Your manager must approve the cancellation.	
3	Click Submit .	



Tip

Cancelled request must be approved by your manager.

The **My Time Off Requests** widget in the **Related Items** pane may also be used to cancel/retract time off request.

You cannot cancel part of a request. All days associated with a request are cancelled. For example, if you originally requested three days off and then decide you only need two days, you must cancel the original request and submit a new request for two days.



Using My Inbox



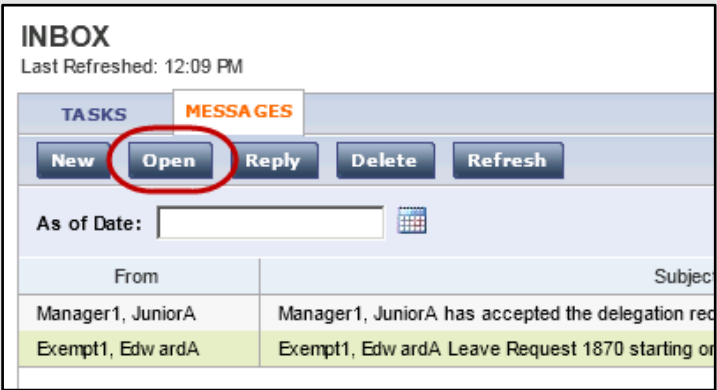
Purpose

When one of your employees submits a message or a request for time off or another manager sends you a request for delegation, the message displays in your eSTART Inbox. You can review these messages in My Inbox.

Note: The My Inbox widget in the Employee Workspace is the same as the My Inbox widget you have access to in the Manager Workspace.

Exercise

You want to review any messages you have received in eSTART. Access the Employee workspace and open the My Inbox widget.

Steps		
1	In the Employee Workspace, select My Inbox from the Related Items pane.	
2	Click the Messages tab to review your messages.	
3	To read a message, select the message and click Open .	



Steps

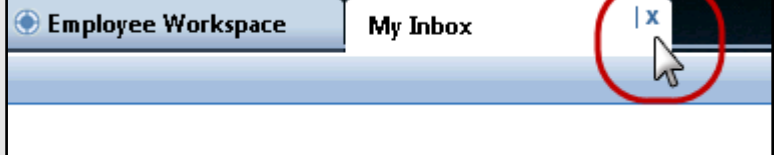
- 4 After you have reviewed the message, do one of the following:
- Click **Reply** to respond to the message.
 - Click **Close** to close the message and return to the Inbox.
 - Click **Delete** to remove the message from the Inbox.
 - Click **Print** to print the message to your local printer.

Select **Close**.

From: Exempt1, Edw ardA
Subject: Exempt1, Edw ardA Leave Request 1870 starting on 01/21/2014 thru 01/21/2014
Received: 12/31/2013 8:00AM (GMT -06:00) Central Time
Exempt1, Edw ardA requests leave starting on 01/21/2014.

[Close](#) [Reply](#) [Delete](#) [Print](#) [Help](#)

- 5 To close the **My Inbox** tab, hover your cursor over the **My Inbox** tab and then click the **X**.




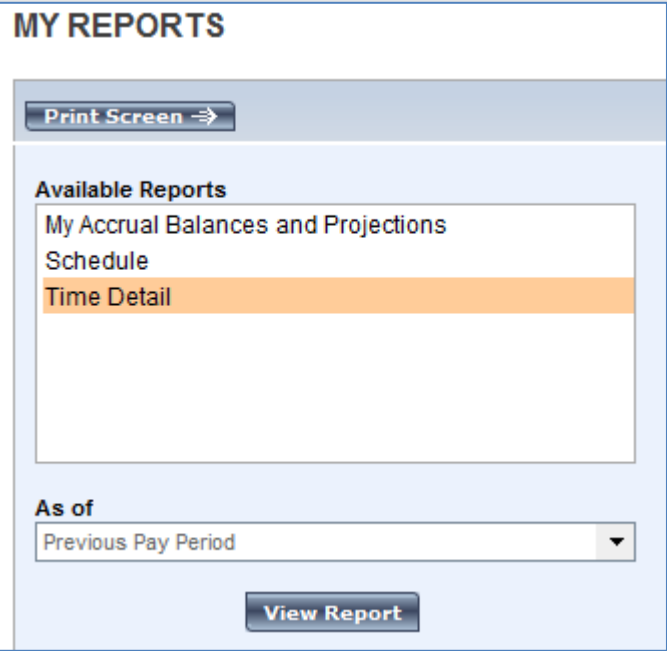


Using My Reports

Purpose

There may be times when you would like to print out information such as your leave accrual balances, schedule or timecard data. You have access to three employee reports for this information using the My Reports widget. When you run one of these reports, it displays in a web browser tab or window, and you print the report using the web browser's Print options.

Exercise

Steps		
1	In the Employee Workspace, select My Reports from the Related Items pane.	
2	Select the desired report from the Available Reports .	
3	Select Previous Pay Period from the As of drop-down list.	
4	Click View Report . The report will open in a new browser window. You may print the report using the browser's File > Print options.	



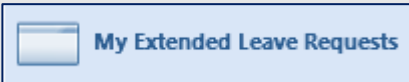

Using My Extended Leave Requests

Purpose

Employees can submit a request for extended leave for FMLA (Family and Medical Leave Act) or Military Leave using eSTART. Employees who are already on leave of absence can request additional time against an existing leave case using the same workspace. Requests for new leave cases and additional leave time are forwarded to your Agency's Leave Administrator.

Exercise

You have upcoming surgery and need to request FMLA leave from work. Submit a continuous leave request for FMLA time.

Steps		
1	Select My Extended Leave Requests from the Related Items pane.	
2	In the My Leave Requests calendar, click Request New Leave Case from the Requests list.	



Steps

3	From the Leave Category drop-down list, select the type of leave: Choose FMLA .	<div><h3>REQUEST NEW LEAVE CASE</h3><div><div>* Leave Category</div><div>FMLA</div></div><div><div>* Leave Reason</div><div>Serious Health Condition</div></div><div><div>Leave Frequency</div><div>Continuous</div></div><div><div>* Leave Start Date</div><div>4/01/2014</div><div></div></div><div><div>Leave End Date</div><div></div><div></div></div><div><div>Leave Hours</div><div>Same hours each day</div></div><div><div>* Approximate Daily Leave Hours</div><div>8</div></div><div><div>Temporary Mailing Address</div><div></div><div></div><div></div></div><div><div>* Describe Details of your Request</div><div>Surgery</div><div></div><div></div></div><div><div>Save</div><div>Cancel</div></div></div>
4	From the Leave Reason drop-down list, select Serious Health Condition .	
5	From the Leave Frequency drop-down list, select Continuous .	
6	From the Leave Start Date drop-down calendar, select 1st Monday of the following month .	
7	From the Leave End Date drop-down calendar, select the date when you expect the leave to end. Note: You can leave this field blank if the end date is unknown. For this exercise, leave the field blank .	
8	Leave Same hours each day selected in the Leave Hours field.	
9	In the Approximate Daily Leave Hours field, enter the number of hours you expect to take each day. For this exercise, key 8 .	
10	The Temporary Mailing Address is an optional field that can be used to inform the agency of the address of the relative you are assisting or the rehab center where you will be staying, etc.	
11	Enter an explanation of the leave request in the Describe Details of Your Request field. Key Surgery .	
12	Click Save . A message displays: Notification has been sent to leave administrator .	



Note

(*) Asterisk - Denotes a required field.

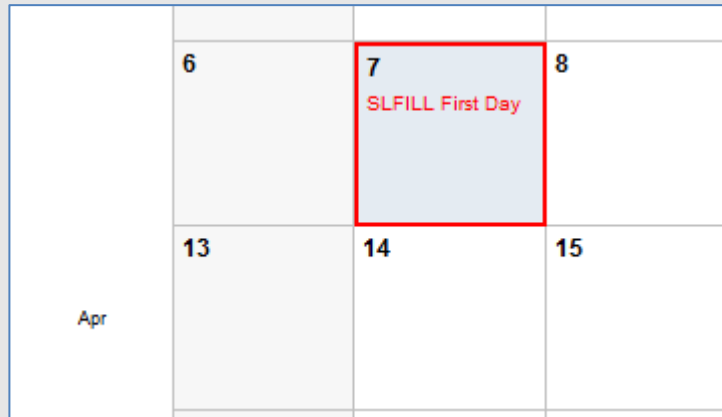


Steps

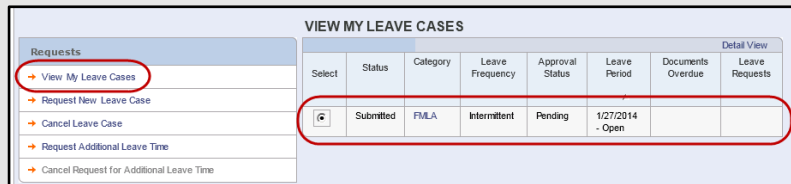
- 13 Choose **Next Month** from the **Time Period** drop down.

Click **Apply**.

- 14 The Leave Request displays as an entry in the **My Leave Requests** calendar.



- 15 To review your leave requests, select **View My Leave Cases** from the **Requests** list.



Note

You may cancel a leave case request from the same **My Extended Leave Requests** calendar as well. Select a leave case and click **Cancel Leave Case** in the **Requests** list. Enter a reason for cancelling the request and click **Save**.

The 'CANCEL LEAVE CASE' form. On the left, the 'Requests' list shows 'Cancel Leave Case' circled in red. The main form area contains the following fields: Leave Category (FMLA), Leave Reason (Family - Child), Leave Frequency (Intermittent), Leave Start Date (1/27/2014), Leave End Date, Leave Hours (Same hours each day), Approximate Daily Leave Hours (8), and Reason for Canceling the Request (a text input field circled in red). At the bottom are 'Save' and 'Cancel' buttons.



Changing Your Password

Purpose

If you have a Network/Email ID, your Logon ID is your email address; your password is your network password. You **cannot** use the Change Password widget on eSTART. Contact your agency Help Desk/IT staff to change your password.

If you do **not** have an email address, your ID is firstname.lastname, your initial password is P@ssw0rd. You are required to change your password at first login. Then for future password changes, you will use the Change Password widget.

Exercise

Follow the steps below to change your password.

Steps	
1	From the Employee Workspace , open the Related Items pane and select Change Password .
2	In the Old Password field, enter the password you want to replace.
3	In the New Password field, enter the new password.
4	In the Verify Password field, re-enter the new password.
5	Click Change Password Now .

CHANGE PASSWORD

Change Password Now

Refresh

User Name sandya.stamp1

Old Password

New Password

Verify Password

The password must not contain any of the following:

- User name
- Spaces

The password must contain all of the following:

- Uppercase letters
- Lowercase letters
- Numbers
- Non-alphanumeric characters

The password is limited by the following:

- Minimum length: 8



NOTES: